

## DOCTOR OF BUSINESS (DBA)

### Legitimising a New Space

### The Case of Teaching and Learning Professionals in Canadian Higher Education

Leblanc, Sheila

*Award date:*  
2014

*Awarding institution:*  
University of Bath

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# **Legitimising a New Space: The Case of Teaching and Learning Professionals in Canadian Higher Education**

**Sheila Ann LeBlanc**

**A thesis submitted for the degree of  
Doctor of Business Administration (Higher Education  
Management)**

**University of Bath  
School of Management**

**February 2014**

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## ***Acknowledgements***

Completing a Doctorate on a part-time basis is often a solitary pursuit, one in which time is torn between so many competing commitments. However, the support I have received from a few key people has meant that the experience of these fragmented times has been filled with significant learning and personal growth. To my supervisors, Professor Ian Jamieson and Professor Juani Swart, you have both my admiration and my thanks. I was quite apprehensive about having academic supervisors from two different disciplines, however, your diverse skills and knowledge stretched my ideas and gave structure to my thinking. To my DBA colleagues, it has been a delight to learn alongside such fine and capable people. In particular, I'll miss the multi-national skype calls with Joanne, Jennifer, George, Ger and Gwen.

I would also like to thank, my former Dean, Elsie Elford, and my former Vice-President Academic, Janet Paterson-Weir, both from Grant MacEwan University, for their encouragement, support and guidance as I started on this journey. And, of course, this study would not have been possible without the Teaching and Learning Professionals who selflessly gave their time and shared their experiences and insights, to each of you, my sincere thanks.

To my husband and partner in life, Charles, your understanding and patience has been invaluable, thank you for your ongoing support as I pursued this goal. To my daughters, Celina and Danielle, who had to forfeit many activities and play dates so Mom could work on her studies, thank you for keeping me grounded and ensuring I remember what is truly important in life. And finally, I'd like to thank my parents, who have always been supportive and encouraging as I made the decision to seek more formal education in my 20's, in my 30's and again in my 40's! Laddering degrees, one each decade, in combination with professional experience is not the typical path, but in doing so I have become a true believer in the value of lifelong learning.

## ***Abstract***

This qualitative, cross-sectional study centres on professionals in the field of educational development, which has been and continues to change significantly in contemporary higher education. Twenty-eight teaching and learning professionals in three broad classifications from 19 Canadian higher education institutions were interviewed. Data was collected to both describe the formal structures and roles and elicit understandings regarding how the individuals see their roles, identities and social power.

Consistent with other international findings, and influenced by the broader changes in higher education, Canadian teaching and learning professional roles appear to be expanding in both depth and breadth. The findings reflect a number of changes and tensions associated with their organisational structure, role design and role classifications. Although they come from a variety of academic backgrounds, the findings indicate a common identity is evolving, underpinned by a set of shared values, strong professional association identification and a shared purpose of bridging and translating needs towards the enhancement of teaching and learning. While respondents described using a variety of power bases and influence tactics to generate change at the individual, group, organisation and system levels their attempts to influence used primarily *soft* power bases rather than *harsh* power bases (Kipnis, 1984).

The findings support previous research that indicates there is a relationship between roles (structure) and identity (Alvesson and Willmott, 2002, Dutton et al., 1994, Ibarra, 1999, Sluss and Ashforth, 2007) and provide evidence to support the theorised link between identity and action (Alvesson et al., 2008, Ibarra, 1999). Further, it is argued, the interconnectivity of role, identity and power, was expressed through respondents' attempts to make sense of and in many cases change the social evaluations of them, their team and their work in an effort to legitimise a unique organisational space and enable them to accomplish their change oriented goals. In light of these findings, a theorised process of how an organisational space for teaching and learning work may be legitimised and a visualised "*middle space*" for teaching and learning work is presented.

## ***Chapter 1 – Introduction***

This thesis centres on the work of teaching and learning professionals in Canada. Interest in this project arose from my professional life. Between 2004 and 2008 I worked as a business school lecturer at a quickly growing teaching focused higher education institution and between 2008 and 2011 as the Director of Corporate Learning and Continuing Education. In the director role, I was responsible for a diverse portfolio which included two teaching and learning professionals responsible for online and blended learning projects within the School of Business; I was also a key member of our institutions' Distributed Education Committee, a subcommittee of our senate. It is here that my interest in the work and role of teaching and learning professionals was sparked.

This introductory chapter will set the stage for the thesis: describing the contextual relevance of the study, the aims of the study and how the thesis is structured. First, contextual information linking the broad based issues affecting higher education to the work of teaching and learning professionals is discussed. Next the substantive, theoretical and methodological aims for the study are offered. Finally, the overall structure of the thesis is presented.

### ***1.1 A Changing Context***

Much has been written in the last two decades regarding the many issues facing contemporary higher education institutions. Broad based issues such as massification, student expectations and engagement, pressure on resources, quality assurance, new technologies and globalisation have led some observers to believe that *disruptive change* (Mehaffy, 2012) or even an *avalanche is coming* (Barber et al., 2013). While it is not clear what higher education systems of the future will look like, it is clear that multiple levers are exerting pressure on higher education institutions to restructure and change many of their deeply embedded assumptions and practices.

In today's institutions, growing student numbers, from more heterogeneous backgrounds, have inevitably affected the scale and complexity of higher education provision. The systems, processes and structures that were established to serve a smaller, arguably more elite, student population now face increasing challenges (Deem and Brehony, 2000, Dearlove, 2002, Lambert, 2003, Trow, 2000, Yelder and Codling, 2004).

This is certainly true in Canada. Participation rates in Canadian post-secondary<sup>1</sup> have reached almost 80% in recent years (Shaienks and Gluszynski, 2007) and, in 2010, Canada had the highest proportion of post-secondary graduates (51%) in the 25 to 64 years age group among member countries of the Organisation for Economic Co-operation and Development (OECD) and the G7 (Employment and Social Development Canada, 2013). Of this age group, the percentage of individuals with university degrees rose from 10.9% in 1990 to 22.2% in 2012 (Employment and Social Development Canada, 2013).

In parallel with this growth, tuition rates have been rising and student expectations have been increasing (Heller, 1997, Leslie and Brinkman, 1987, Looker and Lowe, 2001). In 1990-91 Canadian undergraduate students paid an average annual tuition of \$1,866, in the fall of 2000 the average annual tuition rose to \$3,456 (Corak et al., 2003). The average annual tuition for undergraduate students in 2013-14 is \$5,772 (Statistics Canada, 2013). Moreover, the students' rights movement across higher education in the western world has seen students demand more control over what and how they study (Hill, 1995, Baldwin and James, 2000). University ranking tables, such as the annual Maclean's University Ranking (similar to U.K. League tables), and the annual Canadian University Survey Consortium (CUSC) report, which focuses on student satisfaction, provides students and parents with more information to make decisions regarding institutions and programs. Changes such as these have changed the relationship between universities, faculty and students, positioning students as consumers or customers (LeBlanc and Nguyen, 1999, Marginson, 2006, Slaughter, 2004).

The relationship between universities and the state have also been changing. Coinciding with national pressure to expand higher education participation, has been the creation and refinement of government evaluation systems devised to monitor and assess institutional effectiveness and productivity (Cowen, 1996, 2000). Economic motivation is driving governments to redefine relationships by pressuring institutions to become more accountable, more efficient, and more productive in the use of publicly generated resources (Alexander, 2000). Moreover, governments increasingly recognise the need to align regional economic development needs with workforce development needs and are looking to different sectors of higher education to participate in fulfilling those

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<sup>1</sup> Post-secondary education is very similar to tertiary education or third stage education. In Canada, the delineation between *tertiary* and *higher education* has become less distinct at the undergraduate level. In almost all disciplines Polytechnics and Community Colleges directly transfer students into third or fourth year undergraduate programs at neighbouring universities and they are commonly accredited by their provincial ministry to confer undergraduate degrees in specific disciplines. Some provide graduate degrees in specific disciplines and many are mandated to engage in applied research.

requirements (Altbach et al., 2009). The extent to which post-secondary education in Canada is impacted by these trends can be seen in the four, wide scale post-secondary provincial reviews completed during the last decade that took place in Alberta (Alberta Ministry of Innovation and Advanced Education, 2006), British Columbia (Plant, 2007), Newfoundland and Labrador (Ministry of Education, 2005), and Ontario (Rae, 2005). These reviews leave little doubt that Canadian provincial governments have embraced the view that important economic dividends can be derived from public investment in education and reveal a greater interest, by traditional standards, in influencing post-secondary institutions through funding, quasi-market mechanisms and legislative authority, especially in areas of accountability, transparency and quality (Kirby, 2007).

Amongst all the other environmental changes, in a relatively short period of time, the practice of teaching has also become a lot more complex and demanding. Pedagogic research increasingly suggests that a more active, constructivist mode of teaching is the most effective and this is much more complex than didactic teaching (Conole et al., 2004, Duffy et al., 2012, Larochelle et al., 1998). In the same vein, learner-centred (in contrast to teacher-centred) approaches to teaching have gained significant attention in the research community and implementation of these approaches alter the work of teachers considerably (Weimer, 2013). Moreover, with a wider variety of students pursuing higher education, issues such as *learning styles* and *differentiation* in teaching have become more germane (Coffield et al., 2004).

The feedback of students regarding individual teachers has also become more important. Students are using both formal and informal channels to express their views of teaching. Although the reliability is certainly debatable, websites such as [ratemyprofessor.com](http://ratemyprofessor.com) have become widely used amongst students (Marsh, 2007). More formally, students' evaluations of teaching effectiveness (SETs) are commonly collected by institutions in the U.S. and Canada (Centra, 2003). In some cases, this data is published for student use and/or used as part of performance and promotion discussions with faculty (Marsh, 2007). Further, student engagement data<sup>2</sup> suggests a much wider role for academics in managing the student experience (National Survey of Student Engagement, 2013). All of these pressures, combined with the ongoing technological advancements and discussion regarding flipped classrooms, blending learning and online learning

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<sup>2</sup> Most Canadian Universities and Colleges participate in the National Survey of Student Engagement (NSSE) coordinated by Indiana University in the United States.

courses, such as MOOCs (Massive Online Open Courses) (Daniel, 2012), have undoubtedly created pressure for change in the work of academics.

Mehaffy, Vice-President Academic Leadership and Change at the American Association of State Colleges and Universities (AASCU), pulls together and summarises these contextual threads into a three-pronged overarching challenge for higher education institutions. He states, “we need to educate more students, with greater learning outcomes, at lower costs” (Mehaffy, 2012, p.28). Clearly the work of teaching and learning professionals is closely linked to addressing these challenges. It is suggested that these broader contextual changes coupled with a stronger literature base in the scholarship of teaching and learning and significant advancements in accessibility and functionality of technology have created many openings for teaching and learning professionals to work with faculty and have positioned teaching and learning professionals to play more predominant, change oriented roles in their institutions.

Universities are adapting their organisational structures as they attempt to respond to a shifting environment. New roles are being created and existing roles are evolving. Teaching and learning professionals occupy such roles. Teaching and learning work has the potential to influence many of the changes and challenges higher education institutions are wrestling with today. To what extent and in what ways teaching and learning work is evolving forms a core aspect of this study.

## ***1.2 Aims of the Study***

This study is exploratory in nature and, in light of significant contextual changes, it aims to explore how the work of teaching and learning professionals is evolving within Canadian higher education institutions. It will attempt to create a better understanding of how Canadian teaching and learning professionals see their roles and identity and how the relationship between these perceptions and structure relate to their bases of power and attempts to influence. Power and influence are seen as pertinent constructs as it is argued throughout this study that teaching and learning professionals occupy change oriented roles that require power and influence to accomplish their goals.

The substantive aims of this study are:

- To identify changes in the roles of teaching and learning professionals
- To understand how teaching and learning professionals perceive their identity

- To understand how teaching and learning professionals are generating power and influence
- To bring these three aims together to gain an appreciation of the dynamics between organisational roles, identity and power.

The theoretical aim is to develop a framework using theories drawn from the literature regarding the role of teaching and learning professionals, broader organisational theories, identity theories, emerging third space theory and power and influence theories. To gain a more nuanced appreciation for the individual perspectives of teaching and learning professionals a social constructionist position is adopted. A key strength of this position is that it acknowledges the role of the individual in actively creating (or constructing) social reality through social interaction (Berger and Luckman, 1966, Bryman and Bell, 2007, Gabriel et al., 2000, Robson, 2002).

The methodological aim is to design a small scale qualitative, cross-sectional investigation which will gather, through interviews, the perceptions of Canadian teaching and learning professionals in three broad classifications to describe and explore how their roles, identities and power are evolving. This study is informed by the literature review and based on a grounded theory approach. A qualitative approach and a grounded theory methodology were expected to provide the greatest opportunity to deeply explore the contextual aspects of the environment and its participants, and to consider emerging themes holistically.

In alignment with these aims, the central research question asks, **“How are the roles, identities and power of teaching and learning professionals evolving in Canadian higher education institutions?”** This question should elicit greater understanding into how the work of teaching and learning professionals is evolving.

### ***1.3 Structure of the Thesis***

This thesis is structured around six chapters. Chapter two sets out the three research questions which address the component parts of the central research question and underpin the study. Literature regarding higher education roles and work domains are presented, utilising emerging *third space* (Whitchurch, 2008d) theory to discuss where the role and work of teaching and learning professionals fits into the higher education landscape. Core debates regarding identity development are explored and then applied specifically to teaching and learning professional work. The construct of social power and



the literature associated with bases of power and influence tactics are presented and considered in relation to the limited literature regarding teaching and learning professionals' use of power. Stemming from the literature review, it is proposed that these three concepts (role, identity and power) are interconnected and that they all play a significant part in enabling teaching and learning professional work. The chapter closes by pulling these three areas of literature together and presents a theoretical model which is leveraged in the study.

Chapter three describes the research design methodology and method choices made to support the study and the strengths and weaknesses of these choices. It provides an account of the steps taken at each stage of the study, with reflection on the methodological choice made and ethical considerations. A qualitative, cross-sectional study, informed by the literature review and based on a grounded theory approach is described, utilising interviews with a representative group of 28 teaching and learning professionals in three broad classifications from a wide range of Canadian higher education institutions.

Chapter four provides a brief introduction to the Canadian higher education landscape and presents the key findings of the study, set against the three research questions that guided the investigation. These relate to how the roles of teaching and learning professionals are evolving, how they see their identity and how they generate power and influence. A summary of the findings is also provided. This summary clearly links the findings to each research question and positions the findings in relation to existing literature. The chapter closes with a preliminary discussion regarding how the meta-themes emerging from the data tie the research questions together and appear to be linked to building legitimacy and creating a distinct organisational space for teaching and learning work.

Chapter 5 discusses the implications of the findings and what may be learnt from them both theoretically and in practice. The evidence indicates that, in this study, the interconnectivity between roles, identity and power, were expressed through the processes of building credibility, status and reputation in an effort to acquire the legitimacy needed to influence and accomplish their goals. Stemming from this analysis an original process describing how an organisational space for teaching and learning work may be legitimised and a visualised "*middle space*" for the field of educational development, residing between the agendas of faculty, administration and students are

proposed. A table summarising the contributions this study makes to the literature is also provided. The chapter closes with a number of recommendations for practice that emerged from the study.

Chapter six brings the starting point of the study (the context and research questions) together with a synthesis of the themes detailed in the findings and discussion chapters and it reflects on the overall outcomes in terms of whether the findings have answered the research questions to successfully meet the aims of the study. The concluding arguments are brought together, reflecting on the limitations of the study and leading to ideas regarding potential directions for future research.

A review of relevant literature offers considerable insight into established and emerging theory. The next chapter explores this body of knowledge to critically evaluate and build on what is already known and identify where gaps exist that may be addressed by this particular study.

## ***Chapter 2-Literature Review***

### ***2.1 Introduction***

The study introduction describes a complex context where higher education continues to adapt to environmental changes such as a mass rather than an elite system, a student body that is more diverse and growing in influence, and significant steering from government through funding systems and quality assurance schemes. In response to these pressures institutions have been changing. Existing roles and functions are evolving and new roles and functions are being created with the intent to enable desired, or at times required, changes.

This study centres on higher education professionals in one area, the field of educational development, which has been and continues to change significantly in contemporary higher education institutions. The broader contextual changes coupled with a stronger literature base in the scholarship of teaching and learning and significant advancements in technology have positioned teaching and learning professionals to play more predominant roles in their institutions. These changes are taking place within complex organisations with varying degrees of historical focus on teaching and learning. This study is interested in how incumbents in these roles see themselves and their roles and how they go about achieving their work goals and carving out a space for themselves and, in turn, carving out a space for their developing professional field.

The aforementioned changes have a significant bearing on roles, identities, and power sources of teaching and learning professionals. This study reflects on these changes and asks the central research question, “How are the roles, identities and power sources of teaching and learning professionals evolving in Canadian higher education institutions?” This core question is expressed in terms of three research questions, which address its component parts in more detail:

#### ***Research Question 1***

How are teaching and learning professional roles evolving?

#### ***Research Question 2***

How do teaching and learning professionals perceive their identity?

#### ***Research Question 3***

How do teaching and learning professionals generate power and influence?

It is proposed that these three concepts (roles, identity and power) are interconnected and all play a significant part in enabling teaching and learning professional work. Accordingly, three broad areas of literature including higher education roles and work domains, identity theories and power and influence theories are examined. How these concepts and constructs interrelate is discussed throughout the literature review and further summarised at the end of this chapter.

## ***2.2 Roles and Work Domains in Higher Education***

Shakespeare said, “All the world’s a stage, and all the men and women merely players.” Extrapolating from this metaphor, organisational members are all actors playing a role. A role has been defined as “a set of expected behaviour patterns attributed to someone occupying a given position in a social unit” (Robbins and Judge, 2013, p.311). Many professional roles have been long standing and over time the role expectations and norms associated with the role have become more widely known and established. Organisations also attempt to create role boundaries and role clarity through the creation of organisational structures, job descriptions and job/work instructions. In a higher education context the generalised roles of faculty and administration have influenced and been the subject of much debate on a variety of organisational issues ranging from institutional cultures (Adrianna and Peter, 2002, Clark, 1986, McNay, 1995), new managerialism (Deem, 1998), and changing identities (Bacon, 2009, Henkel, 2000, Whitchurch, 2006). On the other hand, with new and evolving functions, such as teaching and learning professionals, the roles and identities are not as established and are less clearly understood.

This section aims to situate the role of teaching and learning professionals within the organisational landscape of higher education. First a discussion regarding the nomenclature describing the field and the professionals working in the field is offered. Next a discussion of higher education work domains and where the roles of teaching and learning professionals reside within these work domains is examined. Then the history of teaching and learning work and existing literature regarding the evolving roles of teaching and learning professionals is explored. Finally some conclusions from the literature regarding the roles and work domain of teaching and learning professionals are presented.

### **2.2.1 Teaching and Learning Nomenclature**

The literature describing teaching and learning professionals is identified by a number of terms, all of which are used to describe the field where the subjects of this study are situated. These include *educational development*, *faculty development*, *professional development*, *academic development*, and *the scholarship of teaching and learning*. These same words are also used interchangeably to refer to aspects of the wide array of duties within the field (Ouellett, 2010). An active debate regarding what words best describe this work is underway. In the American literature the “traditional but increasingly inaccurate name, *faculty development*” (Gillespie and Robertson, 2010, p.10) is predominant whereas in other international literature (Australia, Canada, the United Kingdom) a more encompassing term, *educational development* which covers initiatives for academic development, staff development and quality enhancement appears to be more typical (Ouellett, 2010). As evidenced by the active debate regarding nomenclature, the work itself is changing and current terms are problematic. The narrow scope and limited tasks historically linked to many of these labels may lead to misunderstandings regarding the breadth, depth and variety of roles emerging. For clarity and consistency in this study, I will use the term *educational development* when describing the field of work and refer to *teaching and learning professionals* when discussing the group of individuals who occupy professional roles within this field.

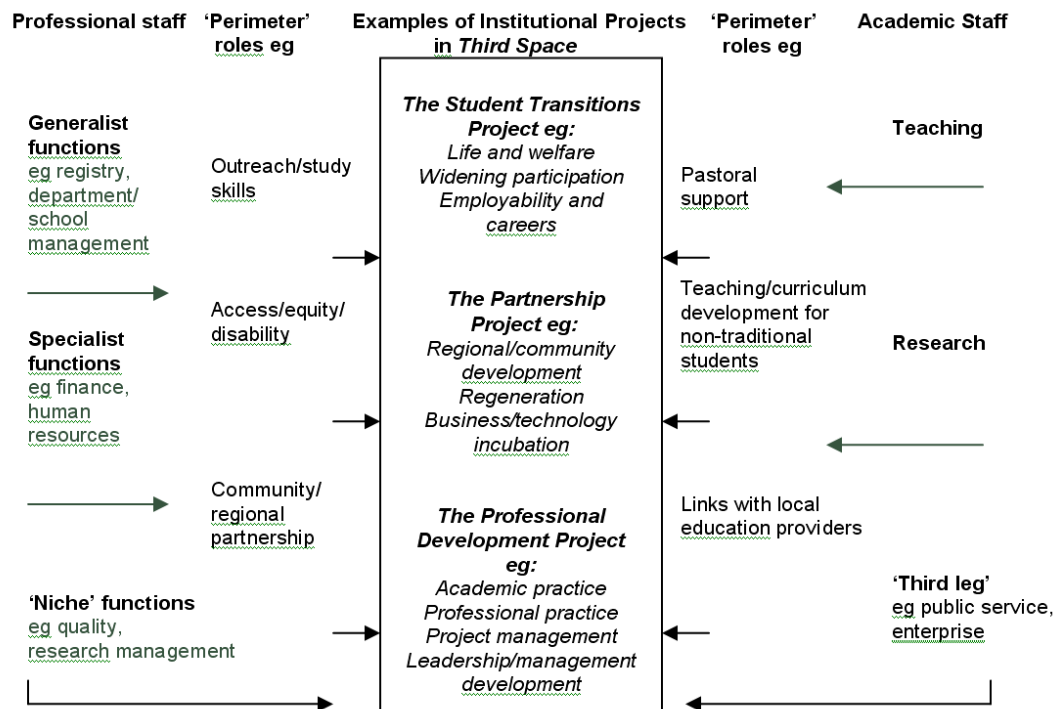
### **2.2.2 A New “third space” Work Domain in Higher Education**

High education literature presents a picture where the roles in higher education are typically binary in nature, identified either as *faculty* or as *administration* (Deem, 1998, Del Del Favero and Favero, 2003, Ewell and Ewell, 1989, McMillen, 2002). In light of major contextual trends, new streams of activity are emerging and new roles are evolving to support these new streams. Associated with these changes, a concept of an additional domain of work activity identified as the *third space* (Whitchurch, 2008c) is developing. This theory merits further discussion in terms of its impact on the evolving work landscape in higher education institutions and its impact on the roles of teaching and learning professionals.

Based on interviews and surveys collected from a total of 61 higher education professional staff members in Australia, the U.K. and the U.S., and building on her earlier work exploring higher education professional identities, Whitchurch (2008c) identifies that significant activity is being created between traditional professional services and

academic domains in higher education institutions. Whitchurch (2008c) argues convincingly that there is an emergent *third space* that exists between academic and professional services domains, which is populated by growing numbers of professionals focused on institutional projects created in response to internal and external environmental changes.

**Figure 1: The Emergence of the *Third Space* between Professional and Academic Spheres of Activity.**  
Adapted from Whitchurch (2008d)



On the left hand side of the diagram are professional staff in more traditional generalist, specialist and some niche functions. The right hand side of the diagram are traditional academic staff who engage in teaching, research and *third leg* activity. Whitchurch (2008c, 2008d) proposes that *perimeter* roles evolved around, for example, in the case of professional staff, outreach and study skills, equity and access, community and regional partnership; and in the case of academic staff, curriculum development for non-traditional students and engagement with local education providers have formed alongside the more traditional functions. She further argues that these *perimeter* roles have progressively converged in a *third space* around broadly based projects such as student transitions, community and industry partnership and professional development (Whitchurch, 2008c). *Third space* is populated by new and evolving roles, in many cases

these are hybrid professionals or *blended professionals*, who are called upon to perform effectively in both academic and administrative areas within fluid organisational structures (Whitchurch, 2008b).

The work of teaching and learning professionals resides within the *third space professional development* project as outlined by Whitchurch (2008c). This view of where teaching and learning and other project work is located within the broader higher education landscape has provided opportunities to reflect upon *third space* work in contrast to the traditional domains of faculty and administration (Whitchurch, 2008a, Whitchurch and Gordon, 2010). For the purposes of this study, it is useful to provide context to the boundaries that teaching and learning professionals navigate as part of their roles. It also useful to reflect upon how *third space* roles, such as teaching and learning professional roles, have or may transition from working on what are arguably temporary *projects* to becoming part of the more permanent and better understood mainstream roles.

While the amount of focus and resources provided to *third space* projects varies from institution to institution, projects in the *third space* are grounded in concepts of organisational change. Their mere existence is change. Actors in these roles are challenged with carving out a space for their work within existing organisational structures. Akin to all organisational changes, this may be enabled by a variety of factors, such as senior leadership support and alignment of rewards and it will certainly encounter at least some level of resistance (Torraco and Hoover, 2005, Kotter and Cohen, 2002, Beer and Nohria, 2000, Kotter, 1986). Inherently the work of *third space* roles, such as teaching and learning professionals, requires an active navigation within the supporting and resisting forces that are unique to the institutional context and desired goals of the role incumbent.

Moreover, the emergence of the *third space* suggests that proactive interpretation of roles and cross-functional working are constructing new forms of identity and authority, which Whitchurch (2008c) argues is changing the legitimacies of higher education professionals. She concludes that “gaining acceptance of these new legitimacies is one of the key challenges arising for contemporary [higher education] professional staff” (p.30). This study explores this challenge by contributing data and reflection regarding how the roles, identities and power sources of teaching and learning professionals are evolving.

We now turn more specifically to the work and roles of teaching and learning professionals. While this work varies significantly (Ouellett, 2010), an awareness of how this work has evolved over time and the common tasks associated with the role is worthy of discussion. The following sections describe the history of educational development work and describe common functions performed by teaching and learning professionals.

### ***2.2.3 History of Educational Development Work***

The field of educational development began to emerge in the higher education system during the social and economic flux of the late 1950's and 1960's (Bergquist, 1992, Rice, 2007, Ouellett, 2010, Sorcinelli et al., 2006). The students rights movement across higher education in the western world saw students demand more control over what they studied (LeBlanc and Nguyen, 1999, Marginson, 2006, Slaughter, 2004) and students asserted the right to give teachers feedback on what they found to be boring and irrelevant courses (Gaff and Simpson, 1994). This movement greatly contributed to a new vision of faculty life, to include "a more holistic focus on, and concomitant rewards for, excellence in teaching and service" (Ouellett, 2010, p.4). Prior to this time success for faculty members had been defined almost exclusively by research and publication success (Ouellett, 2010).

Based on their considerable experience and 494 survey responses from teaching and learning practitioners in the U.S. and Canada, Sorcinelli et al. (2006) propose the evolution of educational development work can be categorised into five ages: *scholar, teacher, developer, learner* and *networker*. They describe the first stage (mid-1950's into the early 1960's) as the *Age of the Scholar*, indicating that during this time educational development efforts intended to improve scholarly competence almost exclusively in the areas of research and publication. The second stage, the *Age of the Teacher* (mid-1960's - 1970's), saw an expansion that targeted improvement in faculty, instructional, and organisational components of teaching effectiveness. During both the first and second stages teaching and learning professionals were experienced faculty members from a variety of disciplines who shared their experience with other faculty colleagues as part of their service to their institution and discipline. Research institutions during this time started offering a number of teaching improvement programmes such as "one shot" workshops, expert centres and financial incentive programmes (Melnik and Sheehan, 1976). The first professional associations, such as the Professional and Organizational



Development Network in Higher Education (known as POD), intended to support this work were also emerging during this time.

Sorcinelli et al. (2006) defined the third stage (the 1980's) as the *Age of the Developer*. During this period a number of educational development units, departments or centres started to appear on campuses. This time was also marked by significant funding for experimentation, research and innovation with new approaches to teaching and educational development (Sorcinelli et al., 2006). It was during this stage and going forward that these roles became more *blended* (Whitchurch, 2009) in nature; with responsibilities spanning both academic and administrative domains. Some institutions created full time professional positions, working under titles such as faculty developer, academic developer, education developer or others. These roles, similar to academic chair roles, were most commonly fixed term rotation of appointed faculty members. These posts had, to varying degrees both administrative and teaching responsibilities.

Sorcinelli et al. (2006) label the fourth stage (1990's) as the *Age of the Learner*. Prior to this stage the primary focus of educational development was developing pedagogical expertise and skills in teaching, this shift moved the focus to include student learning (Sorcinelli et al., 2006). With this shift came interest in student-centred pedagogical methods such as active and collaborative approaches and problem and inquiry-based learning strategies that brought students directly into the teaching and learning equation (Barr and Tagg, 1995, Sorcinelli et al., 2006). This shift was also observed beyond North America. Land (2004), reflecting on his research and experience in a U.K. context, notes that teaching and learning in this period came to be seen by many as more generic and separate from the nexus it formerly constituted with research. This shift in paradigm created the space for centralised educational development units that also housed educational specialists rather than only disciplinary experts (Land, 2004). As demand for services from the teaching and learning function grew, many institutions complemented their rotational faculty posts with specialised professionals in non-faculty posts (Sorcinelli et al., 2006). In parallel, a few institutions created and started to offer academic programmes and career programmes which focus on various elements of teaching and learning scholarship (Ouellett, 2010), such a Masters of Education in Distance Education, a Post-Baccalaureate Diploma in Instructional Design or a Certificate in Technology-Based Learning, which further enabled the specialisation and diversity of teaching and learning professionals.

Finally Sorcinelli et al. (2006) propose that the field has entered the *Age of the Networker*. They propose that in this age, educational developers will be asked to “preserve, clarify, and enhance the purposes of faculty [educational] development and to network with faculty and institutional leaders to respond to institutional problems and propose constructive solutions as we meet the challenges of the new century...”(p.28).

The proposed model identifies a significant increase in depth, breadth and scope of educational development roles during the last few decades. Moreover, data gathered by Sorcinelli et al. (2006) indicate a varied and rapidly growing collection of individuals are working on educational development activities. Each of the phases describes (except perhaps the most current phase) an evolutionary process of how the field of educational development and the focus of teaching and learning professionals changed in response to internal and external environmental pressures.

Other observers have also commented on the expansion in scope. Lewis (1996) recognised the role expansion of educational development and noted it had evolved to include three key areas of effort: personal development (self-reflection, vitality and growth), instructional development (course and student-based activities), and organisational development (programme, departmental, and institutional wide efforts). Schroeder (2011) argues “that a necessary and significant role change is underway in faculty [educational] development...[it] is a call for [teaching and learning] centres to merge the traditional responsibilities and services of the past several decades with a leadership role as organisational developers”(p.6). However, higher education institutions are diverse (Huisman, 2000, Jones, 2000) with varying histories, mandates, missions and cultures and accordingly new functions and roles such as those in the educational development field are evolving differently within different institutional contexts (Lee and McWilliam, 2008). Much of the educational development literature paints a picture of a heterogeneous field (Gillespie and Robertson, 2010, Handal, 2008, Land, 2004, Schroeder and Associates, 2011), with the organisational structures and service offerings varying from institution to institution (Lee, 2010).

#### ***2.2.4 Roles of Teaching and Learning Professionals***

Early on, Francis (1975) defined educational development as a primarily classroom-based, individualised endeavour: a “process which seeks to modify the attitudes, skills, and behaviour of faculty members toward greater competence and effectiveness in

meeting student needs, their own needs, and the needs of the institutions” (p.720). This historic view of the role is still reflected in functions performed by many teaching and learning professionals. Activities, such as workshops, individual faculty consultations and classroom observations, that focus on instructional development and individual faculty are still the most common (Lee, 2010). Even in this early view of the role, the responsibility for change is clearly visible in the expectation that teaching and learning professionals are to influence others towards change. Teaching and learning professionals are called upon to “modify” attitudes, skills and behaviours of faculty (Francis, 1975).

The range of activities performed by teaching and learning professionals at some institutions is broader. As the vision for educational development in an institution expands beyond instructional development, activities such as orientations for new faculty and graduate teaching assistants, acquiring and/or managing internally funded grants to support aspects of course or curriculum development, coordinating teaching circles or faculty learning communities and in a few cases the management of externally grant-funded local or national projects are observed (Lee, 2010). Lee (2010) also notes that in the “wake of centre closings, tightening budgets, and a slowing economy, some educational development departments are becoming far more deliberate in positioning themselves within broader institutional initiatives and in the context of their institutions’ strategic plans” (p.30). For example, focus on broader curricular issues such as general education or assessment have been identified (Lee, 2010). This shift in focus has also translated into the emergence of new partnerships and in some cases new organisational structures for educational development work. Partnerships are emerging between educational development units and instructional technology units, assessment offices, student affairs, graduate schools and writing programmes (Austin and Sorcinelli, 2013). A few examples of educational development units consolidating with instructional technology units or with other professional development functions targeted to faculty, staff and administrators have also been noted (Lee, 2010).

Recent research, conducted in the U.S., explored this broader role for teaching and learning professionals. In a mixed methods study, sampled from the Professional and Organizational Development Network in Higher Education membership (the prevalent teaching and learning professional association in North America), Schroeder and Associates (2011) collected surveys from 149 teaching and learning centre directors and

performed 18 in depth interviews with centre directors and supervisors from 8 case study institutions to explore the current practices, extent of involvement in organisational level changes and the factors enabling and impeding their institutional involvement. Although the results may be somewhat biased, based on the sample selection including only those involved with the professional association, the authors persuasively argue that involvement in institutional initiatives is not merely an emerging role but that it is currently a significant part of a teaching and learning centre director's role at many institutions (66% of survey responders indicate they are key leaders or are highly involved in institutional initiatives, whereas only 6% of survey responders self identified as marginalised or not involved in institutional initiatives). Those who identified as marginalised or not involved indicated institutional leadership and institutional priorities are the most significant impeding factors (Schroeder and Associates, 2011). The four most frequently identified institutional initiatives directors indicate they, as directors of the centre, were involved in are: programme assessment, online/distance education, retention, and scholarship of teaching and learning (Schroeder and Associates, 2011).

In summary, literature regarding the work domain and roles of teaching and learning professionals presents a picture of roles that have been and continue to expand in scope and are quickly evolving. Teaching and learning professional roles, comparable to other *third space* roles have been significantly influenced by changes in the external environmental. However, how these roles evolve is also influenced by a variety of internal contextual variables such as leadership support and institutional focus. Moreover, the traditional role of teaching and learning professionals, which historically focused on working with faculty members on their individual teaching practice, is, at some institutions, expanding to include work at much broader levels.

While the placement of the work boundaries, general role descriptions and organisational structures provide insight regarding the evolution of teaching and learning professional roles and power sources, they provide little insight regarding how the agency and role perception of the individuals occupying these roles is impacting the evolution of their work. To create a more holistic picture of how the roles and power sources of teaching and learning professionals are evolving, concepts surrounding identity are worthy of exploration.

The following section presents the key debates associated with identity formation at a broader theoretical level. Next, emerging literature that explores evolving professional

identities within higher education is examined. Finally, the very limited literature regarding the specific identities of teaching and learning professionals is discussed.

### ***2.3 Constructs of Identity***

Associated with the emergence of new functions and new domains of work, new identities are forming within the higher education sector (Whitchurch, 2008b, Land, 2004). Identity has been described as “the self as reflexively understood by the person” (Giddens, 1991, p.53) and “the sense of self, of personhood” (Abercrombie et al., 2000, p.171). It is the essence of the individual, “whether that essence is thought to reflect an objective reality and/or a subjective construction” (Ashforth et al., 2011, p.1145). Albert, Ashforth and Dutton (2000) further propose that “this construct comes from the need for a situated sense of an identity...[within] an organization, group, or person” (p.13). Various views of identity and identification centres, at least somewhat, on the important question of “Who are we?” or “Who am I?” (Albert et al., 2000, Alvesson, 2001). Identity is central to understanding individuals (Albert et al., 2000, Dutton and Dukerich, 1991, Dutton et al., 1994).

It is through these concepts that people make sense of themselves and others (Weick, 1995). Alvesson, Ashcraft and Thomas (2008), drawing on Cerulo (1997) propose that identity loosely refers to subjective meaning and experience, to our ongoing efforts to not only address the, “Who am I?” but also, by implication, “How should I act?” (p.6). While, on the surface, these questions may appear straight forward enough, organisational researchers have approached these questions and the concept of identity a number of different ways, reflecting different theoretical orientations and cognitive interests (Alvesson et al., 2008).

Research in the field of identity and organisation is fragmented and vast (Jenkins, 1996). It encompasses a range of constructs at multiple levels, such as personal or self identity (Ibarra, 1999, Kreiner et al., 2006, Pratt, 1998, Sveningsson and Alvesson, 2003), group identity (Ashforth and Mael, 1989, Hogg and Terry, 2000) and organisational identity (Albert and Whetten, 1985, Brown et al., 2005, Albert et al., 2000, Elsbach and Kramer, 1996, Gioia et al., 2000). Moreover, researchers coming from different philosophical and theoretical orientations have explored these constructs using a variety of perspectives. Compare, for example, the interpretists’ view of continuous processes within which identity changes over time (Beech, 2008, Beech and Huxham, 2003, Dutton et al., 1994, Humphreys and Brown, 2002, Sveningsson and Alvesson, 2003) to the more

static view of identity which emphasises the concept's core characteristics, or coherent and enduring distinctiveness as seen through a more functionalist lens (Albert and Whetten, 1985).

In an attempt to create a better understanding of the field Alvesson et al. (2008) proposed organisational research on identity could be considered in terms of three broad theoretical perspectives: (1) social identity theory, especially as manifested in organisational identification studies, (2) identity work and (3) identity regulation or control. The following sections briefly discuss each of these perspectives.

### ***2.3.1 Social Identity Theory***

The first and perhaps the most well-known area of organisational research on identity has been in the area of *Social Identity Theory* (Ashforth and Mael, 1989). Social identity theory is a major social psychological theory of intergroup relations and group processes. The original framework was developed in the early 1970s by Henri Tajfel and at the heart of *Social Identity Theory* is that group behaviour arises from a shared sense of social category membership (Tajfel and Turner, 1985).

Based on a review of existing literature and their experience Ashforth and Mael (1989) propose *Social Identity Theory* could be applied to organisations in the areas of organisational socialisation, role conflict, and intergroup relations. Stemming from this review and analysis they argue that “(a) social identification is a perception of oneness with a group of persons; (b) social identification stems from the categorisation of individuals, the distinctiveness and prestige of the group, the salience of outgroups and the factors that traditionally are associated with group formation; and (c) social identification leads to activities that are congruent with the identity” (p.20). Implicit in these findings is the link between understanding identity and attempting to understanding action. Individuals strive to create congruency and reduce cognitive dissonance by aligning their actions with their identity. The study of identity is important in understand behaviour as it influences all behaviour (Gioia et al., 2000). “A sense of identity serves as a rudder for navigating [the] difficult waters” (Albert et al., 2000, p.13) of organisational life.

Empirical research in this area has produced sizeable support for correlations between measures of organisational identification and performance-related indicators such as motivation, loyalty and commitment (Ashforth and Mael, 1989, Mael and

Ashforth, 1995, Elsbach, 2003, Ellemers et al., 2004). On the other hand, one of the key challenges facing *Social Identity Theory* and the construct of identification is “the claim to an individual’s fixed perceptions of an organization” (Alvesson, 2004). As Gioia et al. (2000) identifies, there is a need to account for the chaotic presence of concurrent and conflicting self-images and how these impact identity. This limitation is, at least somewhat, addressed by empirical studies that “situate identification not only in cognitive terms, but also as symbolic rhetorical and/or discursive processes” (Alvesson et al., 2008, p.14). This view opens up the possibility of individuals, through their rhetorical and/or discursive processes, engaging in ongoing identity construction often referred to as *identity work*.

### **2.3.2 Identity Work**

The concept of identity work acknowledges the social element of identity formation but steers its lens towards the individual. Identity work describes, “the ongoing mental activity that an individual undertakes in constructing an understanding of self that is coherent, distinct and positively valued” (Alvesson et al., 2008, p.15). Here the researcher is most interested in the processes of ongoing sense making by the individual. This contrasts the somewhat static and fixed conceptualisation of social identity and identification described above. The focus of this work is more the *process* of becoming rather than of *being* and often addresses issues of individual agency in the process of identity creation (Ashforth and Kreiner, 1999).

The study of identity work in organisations involves an examination of specific processes and influences that contribute to individual identity constructions (Sveningsson and Alvesson, 2003), which many researchers conceptualise as a more or less continuous, ongoing process (Simpson and Carroll, 2008, Beech, 2008, Carroll and Levy, 2010). Identity work happens both consciously and subconsciously. Conscious identity work may be prompted by “a mismatch between self-understandings and the social ideals promoted through discourse” (Alvesson et al., 2008) or from the encounters with others that challenge understandings of self (Alvesson and Willmott, 2002, Klein et al., 2007). Other researchers focus their research on the extent of identity flux, for example, when identity work is intensified in a crisis or through specific social encounters (Beech, 2008, Ibarra, 1999, Beech and Huxham, 2003, Watson, 2008).

### ***2.3.3 Identity Regulation or Control***

Where Social Identification Theory and *identity work* attempt to create a better understanding of the individuals' point of view, identity research in the vein of identity regulation or control takes a more critical perspective. An underlying assumption in much of the Social Identification Theory centred research and *identity work* research is the concept of agency or that "the processes of self-categorization and identification is freely undertaken" (Alvesson et al., 2008, p.16). Research in the area of identity regulation or control challenges this assumption and focuses on managerial interest in influencing employees through appeals to self image, feelings, values and identifications (Alvesson and Willmott, 2002, Humphreys and Brown, 2002, Coombs et al., 1992).

While identity theories are established and important constructs there is an acknowledged lack of multilevel (Foreman and Whetten, 2002) and cross-organisational (Beech and Huxham, 2003) empirically supported research. Alvesson et al. (2008) call for researchers to consider "What?" questions when exploring identity; questions that centre on the concerns of "resources or materials out of which identities are crafted" (p.18). Similar to Barley and Kunda (2001), they suggest looking at embodied practices, such as what people actually do at work, material and institutional arrangements, such as divisions and hierarchies of labour as manifested in job titles and descriptions, reporting structures, salaries and spatial privileges to explore the nuances of identity formation. Coupland and Brown (2012) call for researchers to expand identity research to include an understanding of "how identities are tied to organisational processes and specific outcomes" (p.2). This study contributes to filling a number of these research gaps.

### ***2.3.4 Role and Identity in this Study***

This study is exploratory in nature and seeks to understand how the roles, identity and power sources of teaching and learning professionals in Canadian higher education institutions are evolving. To do so, this study uses an integrated approach to explore identity by suggesting that the concepts of identity regulation/control (Brown and Lewis, 2011, Alvesson and Willmott, 2002), social identities (Ashforth and Mael, 1989, Ellemers et al., 2004, Elsbach, 2004, Tajfel and Turner, 1985) and identity work (Alvesson, 1994, Simpson and Carroll, 2008, Sveningsson and Alvesson, 2003) are all relevant.

Identity is useful as a multi-level construct (Albert et al., 2000, Sveningsson and Alvesson, 2003) and it is recognized in many fields of organisational research that



understanding identity in work environments is significant and that diverse conceptualisations of it offer creative ways to understand a variety of organisational settings and phenomena (Alvesson et al., 2008, Ashforth et al., 2011, Gioia et al., 2010). Kreiner et al. (2006), for example, claim that “organisational identity and individual identity are entangled” (p.1315). Dutton et al. (1994) build their arguments on a core assumption that people’s sense making of their membership in the social group/organisation “shapes their self concepts” (pg. 239). The concept of identity is pluralistic; individuals maintain many identities (Albert and Whetten, 1985, Allen et al., 1983, Foreman and Whetten, 2002, Thoits, 1983). They are simultaneously a variety of individuals, group members and organisational members. In alignment with these views, I assume that we cannot build an understanding of professional identity without ongoing orientation to self identity and acknowledgement of the control processes influencing identity creation. I see identity evolution as a cyclical and back and forth process subject to many influences, including organisational roles and the associated structures, occupational demands of interacting with others as well as individual motivations for change (Alvesson and Willmott, 2002, Dutton et al., 1994, Ibarra, 1999, Sluss and Ashforth, 2007). It is further suggested that the context and structural control elements such as organisational hierarchy design, position descriptions, inclusion or exclusion in particular groups or committees and historical work domains and boundaries all influence the unique institutional ‘role’ which teaching and learning professionals occupy. Role and identity are clearly intertwined, each contributing information sources for the individual to reflect upon as part of their ongoing identity work. Exploring the linkage between formal organisational roles and structures in parallel with identity may allow for a more nuanced answer to the important aforementioned questions of “Who am I?”, “Who are they?” and, in turn, “How should I act?”

In organisational research, theories of identity have been applied in a variety of contexts, including higher education. The following section examines emerging theories of professional identities in a higher education context.

### ***2.3.5 Professional Identities in Higher Education***

Individuals can hold a variety of categories within their self identity. For example one can simultaneously be a female, Chinese Canadian, doctor or a black, male, artist. In an attempt to unpack these nuances some researchers have begun to explore multiple targets of identification. A variety of potential targets such as profession, occupation,

gender and/or race subculture (Johnson et al., 2006, Kuhn and Nelson, 2002, Pratt and Foreman, 2000) have been explored.

Hall (1987) describes professional identity as “the internalization of attitudes, disposition, and self-identity peculiar to the community of practitioners”(p.302). Although there have been numerous studies and significant discourse regarding academic identities (Becher and Trowler, 2001, Henkel, 2000), the identities of other professionals in higher education are still relatively unexplored. At the most senior levels, it is argued that management of higher education institutions has become a partnership between academic and professional managers where the distinction between the two is decreasingly significant (Rhoades and Sporn, 2002). However, at lower organisational levels, the issue of identities of professionals appears less clear cut than at the senior level (Bacon, 2009). Whitchurch’s (2006, 2008a, 2008b, 2008d) work has begun to explore this gap, although for reasons unknown teaching and learning professionals were excluded from this work (Whitchurch, 2008a, p.377).

Whitchurch (2008c) built on her earlier work (Whitchurch, 2006) to propose a typology of professional identities for higher education professionals. She used the concepts of *structure* and *agency* to identify four activity dimensions: professional space, knowledge, relationships and legitimacy. Whitchurch (2008a) argues convincingly that both structure and individual agency contribute to professional identity formation. This involves interaction between the individual and the structures that they encounter, such as a job description, or functional location (Whitchurch, 2008a). This approach links structure and agency, whereby the social structures are seen as being both reproduced and transformed through the practices of individuals and groups of individuals (Archer, 2003, Giddens, 1991).

Whitchurch uses this framework to acquire a more subtle understanding of the identities and evolving roles of higher education professionals. These dimensions are used to exemplify that individuals are not only constructing their identities from a sense of belonging to a specific function or professional groupings, but also by the degree of agency that they adopt towards the structures and boundaries that they encounter (Whitchurch, 2008b, 2008c). This view led to a categorisation of four types of professional identities: *bounded*, *cross-boundary*, *unbounded* and *blended*. By placing the four types of professional identities against the four activity dimensions, sixteen categories of identity characteristics were developed. Whitchurch (2009) later simplified this model into a typology of professional identity dispositions shown in the table below:

**Table 1: Whitchurch's Identity Dispositions**

Identity disposition	Characteristics
Bounded professionals	Work within clear structural boundaries (e.g. function, job description)
Cross-boundary professionals	Actively use boundaries for strategic advantage and institutional capacity building
Unbounded professionals	Disregards boundaries to focus on broadly based projects and institutional development
Blended professionals	Dedicated appointments spanning professional and academic domains

It is suggested that possibly *blended* professionals are not a distinct category in this typology. The *bounded*, *cross-boundary* and *unbounded* identity dispositions are described with key characteristics and language that demonstrates agency or reflexive navigation however the *blended* professional primary characteristics do not. While this category provides very valuable recognition of a new and/or relatively under recognised role type within universities, it does not seem to be consistent within the typology. This inconsistency may be problematic when considering individuals, such as teaching and learning professionals, who are in roles spanning professional and academic domains that identify and express their agency through bounded, cross-boundary or unbounded perceptions, beliefs and actions.

A handful of new observers are surfacing to further unpack the nuances of higher education professional identities. Borden (2008) focuses on two different factors that may influence all higher education professional identities. First, he proposes that how the domain of activity relates to the academic mission is closely linked to the identity of the individual higher education professional. He describes a continuum where one end is populated by those who lead academic operations, such as deans, department chairs, and research centre directors: the other end of the continuum is populated by those who manage generic administrative areas, such as physical plant and purchasing, where the managerial identity is non-problematic as there is typically little or no connection to the academic domain and identity. Along the continuum lay a broad range of roles including

student support, teaching and learning, libraries, information technology and registration. “It is within this grey area that academic and professional identities blend in varying proportions” (Borden, 2008, p.145). It is within this grey area that this study focuses.

His second contention is that the number of unique well subscribed professional associations targeting specific functions for higher education managers has grown to such an extent that they now play a significant role in forming professional identities for higher education managers in the U.S.; “the prevalence in the United States of professional associations related to higher education professional functions is large and growing” (Borden, 2008, p.150). He notes that there is also a plethora of associations or intersecting communities that relate to other dimensions of professional identity. For example, a variety of associations focus on institutions of a certain type such as community colleges or urban and metropolitan universities. A second group of associations span the educational function within broader contexts, such as libraries and educational development. A third group of associations focus on particular cross-functional aspects of post-secondary education, such as liberal education or problem-based learning. Finally there are hybrid associations that bring together academic staff that teach about a functional area with those that practice the function such as student affairs professionals and teaching and learning professionals.

He supports this contention by drawing the link between communities of practice and professional identity formation. Individuals can pick and choose which types of networks to join and can move in and out of these networks as desired to pursue interests and professional growth. “The socialization of practitioners through guided interactions with mentors and peers has been a central component of professional identity development for hundreds, if not thousands of years” (Borden, 2008, p.149). Given the geographic proximity and continuous interaction between U.S. and Canadian higher education professional associations, it stands to reason that this contention would resonate in the Canadian context. The extensive availability and selection of networks or communities of practice support professionalization and inform professional identities of higher education practitioners. If one takes on a new post with unfamiliar roles and responsibilities, one can quickly come up to speed through workshops, conferences, participation in listserv communities and by reading the available trade literature. Furthermore, and perhaps most importantly, one can interact with colleagues inside and outside of institutional boundaries to gain access to additional perspectives and ideas regarding the role.

Bacon (2009) argues that there is a crucial distinction between generic higher education professionals and specialists from professions which exist outside the world of higher education. To support his argument, he considers identities categorised as *essential*, which is established through the core activities of your roles, and *situational*, which has to do with the location of professional commitment. For example in the case of academics, the *essential* professional identity comes through teaching, research, and more rarely management. The *situational* academic identity is often first linked with their discipline, then with their department and finally, and most rarely, with their institution (Henkel, 2000).

Similarly, this multiplicity of identities and associated identification was earlier discussed by Gouldner (1957). Based on case study interviews with 125 faculty members [97% of all faculty members at the case campus] Gouldner (1957) distinguishes between *manifest* identities and roles and *latent* identities and roles in groups. He describes *manifest* identities as those which are “consensually regarded as relevant [to them] in a given setting” (p. 285). Whereas *latent* identities are not regarded as relevant to the group setting but are likely to affect the way the *manifest* role is performed. Gouldner (1957) further distinguishes between the *latent* roles of *cosmopolitans*, who are “low on loyalty to the employing organization, high on commitment to specialized role skills, and likely to peruse an outer reference group orientation”, and the *locals* who are “high on loyalty to the employing organization, low on commitment to specialized role skills, and likely to use an inner reference group orientation” (Gouldner, 1957, p.290). This multiplicity of identities is also implied in the limited literature regarding teaching and learning professional identities.

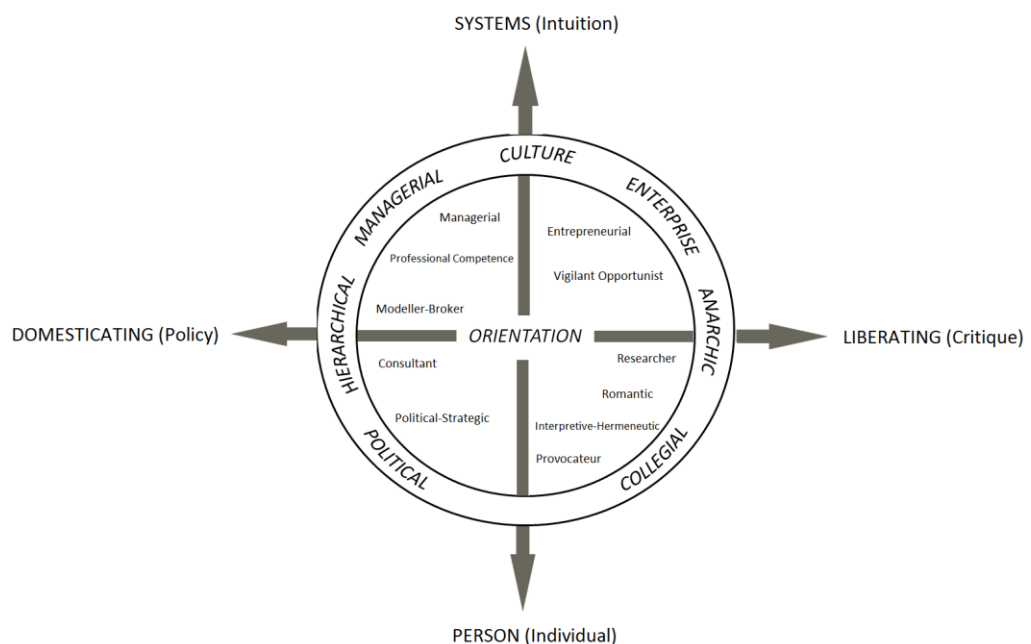
The previous sub-sections explored the broad based theories of identity and the literature and theories of non-faculty professional identity within a higher education context. The next and final section discussing identity examines the literature at a more granular level, focusing on the identities of teaching and learning professionals.

#### ***2.3.5.1 Teaching and Learning Identities***

There is very little literature focused on the identities of teaching and learning professionals. My literature search identified only one empirical research study, which explores the identities of teaching and learning professionals.

From the narratives of 35 interviews with teaching and learning professionals in a range of UK universities Land (2004) derives a set of 12 *orientations* to educational development work. These include: Managerial, Political Strategic, Entrepreneurial, Romantic, Vigilant Opportunist, Researcher, Interpretive – Hermeneutic, Professional Competence, Reflective Practitioner, Internal Consultant, Modeller-Broker, Provocateur. These *orientations* are not characteristics of individuals but are different forms of “strategic conduct” used to navigate and make sense of the various “contexts and terrains” (Land, 2004, p.13) in which they practice. More specifically, he described these orientations as “analytic categories that include the attitudes, knowledge, aims and action tendencies of educational developers in relation to the contexts and challenges of their practice” (Land, 2004, p.13). Land (2004) suggests that these *orientations* reflect two important distinctions in the underlying values regarding the purpose and goals of educational development work.

Figure 2: Land's Model - “Towards an Ecological Paradigm of Educational Development” (2003, p. 178)



Land presents a model with two axes each representing polarised tendencies and he places each of the *orientations* within an associated quadrant. The first presents a

spectrum between “domesticating” defined as encouraging or developing behaviours that conform to the mission of the institution or its prevailing and influential normative cultures and “liberating” which would encourage or develop behaviour that runs counter to such prevailing purposes and cultures and would seek to transform them (Land, 2004). The second axis charts between practices focused on individual academics or students, labelled as “person” and practices focused on the requirements of the institution at a system level, labelled as “systems” (Land, 2004). Land (2004) uses the words *behaviour* and *practices* to classify identity *orientations*. Land’s (2004) work further supports the intertwined nature of identity, roles and action. This proposed model and Land’s analysis indicate the significance of understanding the individuals’ perspective regarding the purpose of their work when attempting to understand their *orientation* to how they enact their work.

There are a few reflective papers, based on the authors’ experience, which discuss the identities of teaching and learning professionals. For example, authors reflect upon concepts such as *community of practice* (Handal, 2008) or *change resistance* (Land, 2008) to explore teaching and learning professional identities in relation to faculty. Each of these papers acknowledges the lack of a consistent identity within the educational development field. There is also an apparent struggle with legitimacy expressed in this work and suggestions to create legitimacy are common themes. For example, Manathunga (2007) argues there is a need to change the *unhomely* (Bhabha, 1994) identity of teaching and learning professionals. Others authors argue identities such as a *critical friend* (Handal, 2008), a *court jester/fool* (Handal, 2008) or a *change agent* (Schroeder and Associates, 2011) are potentially desirable or useful. Despite the fact that none of this work is empirically based it does provide some insight regarding how teaching and learning professionals may see themselves.

In summary, this section explored the theoretical constructs of identity and examined how these constructs have been used in a higher education context to explore professional identities. The intertwined nature between roles and identity and the link between behaviour and agency make the construct of identity particularly useful in this study. The identity models, views and typologies stemming from research in a higher education context reflect the somewhat unique organisational realities and history of higher education institutions. The centrality of the faculty function and the associated boundaries and paradigms established by rhetoric of faculty work versus administration

work have provided an interesting lens to reflect upon the other, non-faculty, professional work within higher education institutions.

There are a number of research gaps in the broader identity research that this study contributes to filling. Moreover, there are very few studies exploring non-faculty professional identity; although they are fundamentally consistent with the earlier discussed theories of identity creation. They present a pluralistic view of identity where multiple structural variables, social interaction and individual agency all contribute to identity creation. The limited research regarding non-faculty professional identities and teaching and learning professional identities indicate that issues surrounding role legitimacy, role boundaries and structure, and the individuals' orientation to the purpose of their role are salient factors in their identity formation.

We now turn to the concepts of power and influence. The contacts and ongoing communications between individuals serve many functions such as exchanging information, providing a sense of belonging and asserting one's identity, although, arguably one of the most important ones is to influence others and be influenced by others (Bruins, 1999). Given their change oriented roles, this is especially true in the case of teaching and learning professionals. Handal (2008) states, "an academic developer [teaching and learning professional] is a person in the academy who is actively and purposefully engaged in contributing to change... [to] change aspects of the academic culture and the practice of academics within it." This view is supported by many others in the higher education field (Austin and Sorcinelli, 2013, Gillespie and Robertson, 2010, Land, 2004, Schroeder and Associates, 2011). However, as explored by Land (2004), individuals hold differing views regarding the purpose of their role and they may orientate themselves to their roles in a variety of ways which in turn may impact how they go about acquiring power and using it to influence others.

## ***2.4 Social Power and Influence Tactics***

The following section aims to provide an overview of the key debates in the literature regarding social power and influence tactics. To understand how teaching and learning professionals are generating power and influence it is essential to start with a clear understanding of what social power and influence tactics are. It is important to note that the construct of 'power' exists in a number of social sciences however this review is limited to the social psychology construct typically referred to as social power. First the



concept of power is examined. Then influence tactics and variables associated with power and influence tactic use are explored. Finally the very limited knowledge regarding how teaching and learning professionals generate power and use influence is discussed.

#### ***2.4.1 Power - the Potential to Influence***

Research on the bases of social power has become a fundamental concept in social and organisational psychology. Social power is defined as the potential or ability of an agent to bring change in attitudes, behaviour, or belief by using resources available to him or her (Raven, 2008).

Current theories of power originated from the work of Kurt Lewin. Lewin (1941) theorised power as the possibility of inducing force on someone else. More specifically he considered potential power as the maximum force person A could induce on person B divided by the maximum resistance that person B could offer. Building on Lewin's initial theory, French and Raven (1959), undoubtedly among the most popular and utilised taxonomies in the literature on social power, offered five different bases of power: *reward*, *coercive*, *legitimate*, *reference* and *expert power*. Raven (1965) later added a sixth base, *informational power*. In this initial work the bases of power were primarily explored in terms of how the different power base utilised impacted aspects of the social influence process in terms of compliance, identification, and internalisation (Kelman, 1961).

French and Raven (1959) describe *reward* and *coercive power* as dependent on the agent's ability to bestow positive and negative outcomes respectively on the target. Their findings indicate using these bases only produces public compliance and continuation of the desired change would depend on successful surveillance of the target. The targets' privately held beliefs, attitudes, or values are not changed (French and Raven, 1959).

*Legitimate power* stems from the target's belief that the agent has a legitimate right to exert influence and that the target is obligated to accept this influence. French and Raven (1959) define *legitimate power* as "that power which stems from internalized values in P [the target] which dictate that O [the agent] has a legitimate right to influence P and that P has an obligation to accept its influence". They further elaborate that these internal values may originate from parents, cultural values or acceptance of the social structure (especially that which involves a hierarchy of authority). For example, in a relationship between offices rather than between persons there may be an acceptance

that the office has a *right* to their legitimate power --- such as a judge has a right to impose fines. However, they clarify, that *legitimate power* also involves the perceived right of the person to hold the office. If there is perceived *legitimate power*, it leads to private acceptance that comes from within the target and as such it does not require surveillance by the agent in order to be successful (French and Raven, 1959).

*Referent power* depends upon the target identifying with the agent. It too leads to private acceptance by the target as the target values a relationship with the agent and desires to see themselves as similar to the target on certain dimensions (French and Raven, 1959).

*Expert power* of the agent depends on the target's belief that the agent has superior knowledge or experience. If the target has very strong faith in the agent it will lead to private acceptance on the part of the target and therefore would not require monitoring to ensure continuance (French and Raven, 1959). Raven (2008) offers the following example as *expert power*, "My supervisor has had a lot of experience with this sort of thing, and so s/he is probably right, even though I don't really understand the reason" (p.3). This example is useful to distinguish *expert power* from *informational power*. In contrast, the target might think, "Yes, I listened carefully to A [agent] and I can now see for myself that this is clearly the best way to deal with the problem" (Raven, 2008, p.3). Raven (2008) clarifies that what distinguishes between *expert power* and *informational power* is "understanding the reason". *Informational power* is based on the target understanding the information contained in the influence attempt and how the target perceives the relevance and validity of the information. Changes ensuing from this power base result in internalized and lasting changes in the target's beliefs, attitudes or values (Raven, 2008). It is described as being independent of the agent and of the agent's relationship with the target. While Raven argues (2008) this distinction is significant, much of the literature subsumes *informational power* under *expert power*. Another notable taxonomy related to social power was proposed by Morgan (1997). Morgan (1997) proposes 14 sources of power, most of which have parallels to the broadened French and Raven taxonomy described next.

In light of additional research the Raven and French taxonomy was broadened to include 11 bases of power. These included further differentiation of *coercive power* and *reward power* in terms of *personal* versus *impersonal* forms (Raven, 1992, Raven et al., 1998). This differentiation acknowledges that reward and coercion power bases' strength

are linked to how the target perceives the agent of the influence attempt. For example, “personal approval from someone whom we like can result in quite powerful *reward power*; and a threat of rejection or disapproval from someone we value highly can serve as a source of powerful *coercive power*” (Raven, 2008, p.3). Delineation between *positive* versus *negative expert* and *referent power* (Raven, 1992, Raven, 1993) has also been argued. Moreover, *legitimate power* has been further unpacked by researchers. In addition to *legitimate position power*, the more subtle *legitimate power of reciprocity* (Goranson and Berkowitz, 1966, Gouldner, 1960), *equity* (Hatfield et al., 1978) and *social responsibility* (Berkowitz and Daniels, 1963) have been identified. Pierro et al. (2012b) clarify the four types of *legitimate power* as follows: *legitimate position power* is based on a social norm requiring obedience from people who are in a superior position in a formal or informal social structure; *legitimate power of reciprocity* is based on the social norm that requires someone to feel the obligation to reciprocate; *legitimate power of equity* is based on an equity (or compensatory) norm requiring obedience to someone who has suffered or worked hard, or someone whom we have harmed in some way; and *legitimate power of dependence* is based on a social responsibility norm that obliges compliance with the requests of someone who is in need of assistance.

While French and Raven’s original and broadened taxonomy are still widely popular and accepted conceptualisations, there have been criticisms of this conceptualisation. A noted challenge, identified by Raven (1974), and elaborated on by Kipnis et al. (1980) is that the power bases and tactics used overlap with each other. A further problem and perhaps the most challenging is the underlying assumption of rationality. When actual influence acts are studied, it is found that people do not exercise influence in ways predicted by rational classification schemes (Kipnis et al., 1980, Kipnis and Schmidt, 1988).

While the finer differentiation of power bases has proved useful in exploring the subtleties of power, subsequent research has demonstrated that in most settings, other researchers have looked at power in a more simplistic categorisation as either *harsh* and *soft* categories (Pierro et al., 2008, Pierro et al., 2012b, Pierro et al., 2012a). *Harsh* and *soft* categories of power are described next.

#### ***2.4.1.1 Harsh versus Soft Bases of Power***

A further distinction made by researchers is a description of each of the bases of power in terms of being either *harsh* (i.e. punitive and overt) or *soft* (i.e. subtle and positive) (Kipnis, 1984). *Harsh* versus *soft* bases of power are further differentiated by the amount of freedom that the target feels in choosing whether or not to comply. *Harsh* power bases limit individuals' freedom to comply with the influencing agents' demands. *Harsh* power bases include coercion, reward, legitimacy of position, equity, and reciprocity. On the other hand, *soft* power bases provide targets of influence with more freedom and autonomy in accepting the demands from the influencing agent (Pierro et al., 2008). *Soft* power bases include expert, referent, informational power, and legitimacy of dependence. Compared to *harsh* power bases, *soft* power bases are typically received more favourably and are associated with more positive individual and organisational outcomes (Pierro et al., 2012b, Yukl et al., 1996, Falbe and Yukl, 1992). In contrast, there is evidence that suggests context may influence the outcomes of *harsh* versus *soft* power base use. For example, the study performed by Emans et al. (2003) indicates positive outcomes from *harsh* power base use, however, the study was situated in a policing context.

To explore how bases of power translate into behaviour and action it is useful to discuss the influence process and influence tactics.

## ***2.4.2 From Potential Power to Action***

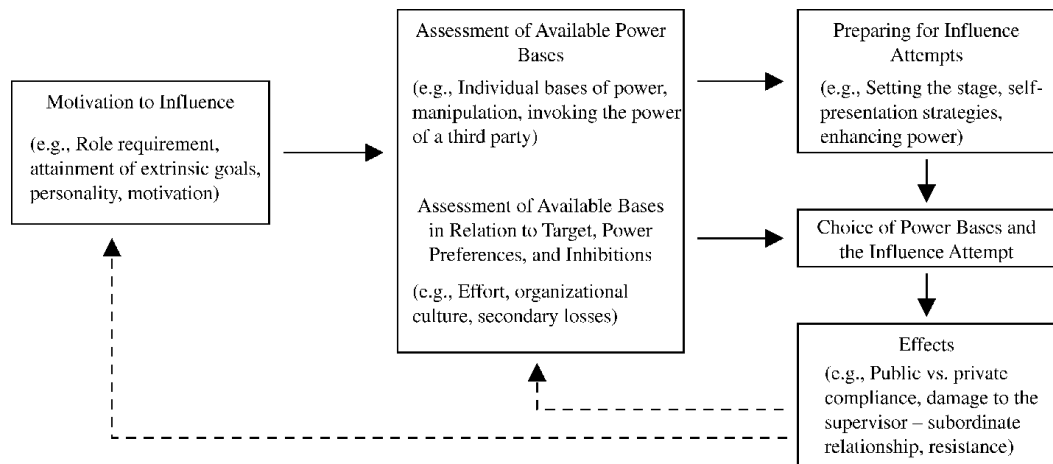
There is a significant but rather uncoordinated body of literature that explores how influence processes take place. French and Raven (1959) defined *influence* as the force one person (the agent) exerts on someone else (the target) to induce change in the target. *Influence* is the processes, the actions, and the behaviour through which potential power is utilised.

Influence processes are complex and involve a wide range of variables. Shown below, Raven (1992) leveraged the six bases of power and his experience to propose a theoretical model of social influence processes in his *Power/Interaction Model of Interpersonal Influence*.

**Figure 3: Raven's Power/Interaction Model of Interpersonal Influence<sup>3</sup>**

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<sup>3</sup> Image adapted from ELIAS, S. 2008. Fifty years of influence in the workplace: The evolution of the French and Raven power taxonomy. *Journal of Management History*, 14, 17.



Source: Raven (1992, 1993)

In essence, “the model describes the agent as a rational decision maker who weighs various costs and benefits of the power bases available to him/her before invoking one of them to influence the target” (Bruins, 1999, p.9). This model considers the outcomes of the influence attempt from both the agent’s and targets’ perspectives. Potential outcomes from the agents’ perspective include changes in their assessment of available power bases, motivation to influence the target, and in perceptions of both self and the target (Raven, 1992). On the part of the target, changes in the target’s perception of self and of the agent, and changes in the power relationship are described as possible consequences (Raven, 1992).

Implicit in the model is a linkage between how the agent sees himself/herself (identity), their role requirements and their goals with how they execute an influence attempt. It also implies agency and sense making on behalf of the agent. The agent has choice and forethought associated with their influence acts. The previously discussed identity questions of, “Who am I?” - the agent, “Who are they?” – the target, are clearly part of the influence process. Moreover, the action related question, “How should I act?” is further informed by the agents’ perception of their role, their goals, and their available bases of power. This model further demonstrates how intertwined the concepts of identity, organisational role and power bases are. Nevertheless, while this theoretical model is useful to gain an appreciation for the dynamic complexity and wide range of variables involved in influence processes there has been little research utilising the model. Only small components of this model have been empirically tested (Pierro et al., 2012b).

In a somewhat narrower view, but arguably a more practical one, researchers have investigated and categorised the specific behaviours, often called influence tactics, people

have at their disposal to influence others (Kipnis et al., 1980, Yukl and Tracey, 1992, Falbe and Yukl, 1992).

#### **2.4.2.1 Influence Tactics**

Kipnes et al. (1980) through their research with part-time business graduate students identify eight categories of tactics used: *assertiveness, ingratiation, rationality, sanctions, exchange, upward appeal, blocking* and *coalitions*. Very similar results were obtained by Yukl and Tracey (1992) working with volunteers attending a management workshop. A decade later Seifert et al. (2003) consolidated results from a number of additional studies that used a variety of methodologies. From those findings they added two additional tactics to Yukl and Tracey's (1992) original work which results in the following 11 proactive influence tactics: *rational persuasion, consultation, inspirational appeals, collaboration, apprising, ingratiation, personal appeals, exchange, legitimating tactics, pressure* and *coalition tactics* (Seifert et al., 2003).

The following figure briefly describes each of the 11 tactics.

**Table 2: 11 Proactive Influence Tactics**

<i>Rational persuasion</i>	The agent uses logical arguments and factual evidence to show that a request or proposal is feasible and relevant for important task objectives.
<i>Consultation</i>	The agent asks the target person to suggest improvements or help plan a proposed activity or change for which the target person's support is desired.
<i>Inspirational appeals</i>	The agent appeals to the target's values and ideals or seeks to arouse the target person's emotions to gain commitment for a request or proposal.
<i>Collaboration</i>	The agent offers to provide assistance or necessary resources if the target will carry out a request or approve a proposed change.
<i>Apprising</i>	The agent explains how carrying out a request or supporting a proposal will benefit the target personally or help to advance the target's career.
<i>Ingratiation</i>	The agent uses praise and flattery before or during an attempt to influence the target person to carry out a request or support a proposal.
<i>Personal appeals</i>	The agent asks the target to carry out a request or support a proposal out of friendship, or asks for a personal favour before saying what it is.
<i>Exchange</i>	The agent offers something the target person wants, or offers to reciprocate at a later time, if the target will do what the agent requests.
<i>Legitimizing tactics</i>	The agent seeks to establish the legitimacy of a request or to verify that he/she has the authority to make it.
<i>Pressure</i>	The agent uses demands, threats, frequent checking, or persistent reminders to influence the target to do something.
<i>Coalition tactics</i>	The agent enlists the aid of others, or uses the support of others, as a way to influence the target to do something.

Both Kipnis and Yukl, with their various colleagues, have created instruments to measure influence tactics. Kipnes et al. (1980) created an agent self-report questionnaire called the Profiles of Organizational Influence Strategies (POIS) to measure influence tactics utilised. From a different viewpoint, Yukl et al. (1992) developed and validated a questionnaire to be completed by targets of influence attempts. In the Yukl et al. (1992) instrument the respondent rates how often a specific agent uses examples of each tactic in attempts to influence the respondent. Rating survey instruments such as these have their practical uses, for example, in professional skill development workshops; however they lack the richness and depth desired by my interpretist perspective. Furthermore, these tools would provide little insight regarding how the roles and associated identities of teaching and learning professionals are evolving in conjunction with their power bases; therefore they are not utilised in this study. Yet the categories of influence tactics provide

interesting frame for analysis when exploring the roles and power sources of teaching and learning professionals.

#### ***2.4.2.2 Variables Impacting Power Base and Influence Tactic Use***

To better understand the influence process, researchers have explored the relationship between a number of variables and the influence tactic chosen (Emans et al., 2009, Yang et al., 1998, Yukl et al., 1996). The two most significant variables are status and gender.

Status has been found to be a mediating variable in influence tactic choice (Kipnis et al., 1980, Raven, 2008, Raven, 1992, Raven, 1993, Yukl et al., 1996). Specifically, as the status of the target person increases, agents place more reliance on rationality [*soft*] tactics (Kipnis et al., 1980) and are less likely to use *harsh* tactics (Cohen and Bradford, 1989, Raven, 2008, Yukl et al., 1996).

Researchers exploring the impact of status as it relates to influence tactics typically identify the relationship between the agent and target in three categories. They identify the target as: a superior, a co-worker, or a subordinate. This categorisation process, while useful for some purposes, may limit an understanding of the how the status between individual roles is changing and evolving. In many organisational structures and certainly in contemporary higher education institutions the answer to these questions is not always clear. For example, is a Director of a teaching and learning centre who is a direct report to the Vice-President Academic, participates with all of the Deans at the Vice-Presidents' monthly team meeting, and also holds a faculty position in the School of Business a peer, or subordinate to the Dean of Business? Or how does that status relationship change if that same Director of Teaching and Learning holds a senior administrator post, with no faculty position? Given the loosely coupled (McNay, 1995) nature of Higher Education organisations and the variations in how teaching and learning functions have evolved in various institutions, it will be useful to have a richer understanding of how teaching and learning professionals see themselves relative to others. This may assist to unpack the nuances of how status and formal position in the hierarchy impact identity, roles and power bases of teaching and learning professionals.

Numerous studies have also demonstrated the role gender plays in one's ability to use social power (Elias and Cropanzano, 2006, Dreher et al., 1989, Elias, 2004, Elias and Loomis, 2004). Gender differences in how power is viewed (Drory and Beaty, 1991,



McClelland and Burnham, 1995) and differences in assertiveness (Rizzo and Mendez, 1988) are identified as important factors. However, there is conflicting evidence depending upon the direction (Harper and Hirokawa, 1988) and purpose (Dreher et al., 1989) of the influence attempt. In contrast, (Vecchio and Sussmann, 1991) found no gender difference in their exercise of power except that women were more likely than men to use coalition formation as an influence tactic.

### ***2.4.3 How Teaching and Learning Professionals Generate Power and Influence***

There is a dearth of literature regarding how teaching and learning professionals generate power and use influence. My literature review uncovered no studies that have directly considered these concepts in association with the field of educational development.

Literature regarding the educational development field does provide some indication or references to the creation and use of power and influence. For example, there are indications of shifting power bases and influence attempts in the earlier discussed literature regarding a broader organisational role that has been observed and encouraged in teaching and learning professionals. The case studies along this vein (Schroeder and Associates, 2011) explore how individual teaching and learning directors were able to evolve their work and become more involved with institutional level issues. Certainly, these case studies provide some insight regarding the evolving power bases and influence tactics of teaching and learning professionals. For example, how a teaching and learning director has taken proactive action with the intent to secure “a seat at the table” (Chism, 2011, p.47) and become involved in institutional level initiatives certainly involves an increase in legitimate power. Also, contrary to other reflection literature (see, for example Mullinix, 2008), Schroeder and Associates (2011) found that having faculty status was not an enabling factor in a quest to gain involvement in institutional initiatives. Other reflective practitioner literature explores “effective practices” (Cook and Marincovich, 2010, Reder, 2010, Burnstad and Hoss, 2010) to accomplish teaching and learning professional goals. Work in this vein emphasises the importance of the type of university (research oriented, comprehensive, liberal arts focused, etc.) and propose a number of suggestions related to power as being helpful in accomplishing goals, such as rewarding good teaching with resources and prestige (Cook and Kaplan, 2012) and being a member of influential committees (Chism, 2011). In Land (2004), many of the teaching and

learning professional narratives describe influence attempts, however they are not categorised or analysed in relation to the constructs of power or influence. There is clearly a gap in the literature regarding how teaching and learning professionals generate power and influence and how their power bases are evolving.

In summary, power and influence are important constructs that assist in generating an understanding of organisational phenomenon. Power use and influence constructs are established, however, the associated processes which use these constructs are complex and involve a wide range of variables. Theoretical models indicate a general linkage between how individuals see themselves and their role with their influence attempts, though only relative status between the agent and target and gender have been supported by empirical research as significant variables in determining power use or influence processes. Moreover, there is a dearth of literature regarding how these processes are enacted by teaching and learning professionals.

## ***2.5 Chapter Conclusions and Theoretical Approach to the Study***

Both internal and external environmental trends have put pressure on higher education institutions to change. In response to these pressures institutions have, to greater or lesser extents, increased their focus on a number of *third space* projects which include the work of teaching and learning professionals (Whitchurch, 2008b, 2008d). These projects are challenging the historic role boundaries, organisational structures and legitimacies of many professionals within higher education institutions. Associated with these changes existing roles and functions are evolving and new roles and functions are being created. As a result, the roles, associated identities and power sources of many higher education professionals are changing. An example of which is that of teaching and learning professionals.

The literature indicates the roles of teaching and learning professionals are expanding in scope and quickly evolving (Sorcinelli et al., 2006, Austin and Sorcinelli, 2013, Ouellett, 2010, Schroeder and Associates, 2011). However, there is considerable inconsistency in depth and breadth of these roles from institution to institution.

The theoretical constructs of identity are well established, however research in this field has been explored in a number of different ways, reflecting the different theoretical orientations and cognitive interests of researchers (Alvesson et al., 2008). A pluralistic

view of identity where multiple structural variables, social interaction and individual agency all contribute to identity creation (Dutton et al., 1994, Ibarra, 1999, Sluss and Ashforth, 2007) indicates value in exploring roles and identity simultaneously.

In a higher education context, there is limited amount of research exploring non-faculty identities. The identity models, views and typologies in this vein reflect the somewhat unique organisational realities and history of higher education institutions. The centrality of the faculty function and the associated boundaries and paradigms established by rhetoric of faculty work versus administration work are typically central to this research. The one study that specifically explored the identities of teaching and learning professionals identified 12 orientations, forms of “*strategic conduct*” or approaches to their work which appear to be linked to their preconceptions and values regarding the purpose of the work (Land, 2004).

No existing research that directly explores the social power and influence of teaching and learning professionals was found. However social power and influence are important constructs and there is an acknowledged link between identity and behaviour (Alvesson et al., 2008, Cerulo, 1997). While the correlation between identity and behaviour in theoretical models is broad, only relative status between the agent and target and gender have been supported by empirical research as significant variables in determining power use in influence processes.

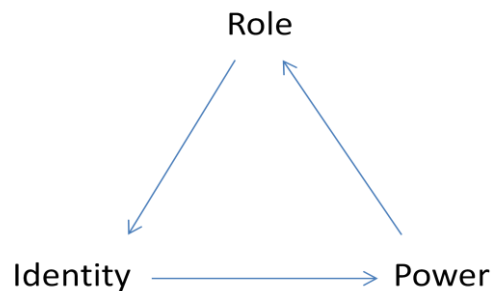
There is evidently still much scope for research regarding the roles, identities and power sources of teaching and learning professionals. The limited literature regarding higher education professionals’ work domains and identities and the literature regarding teaching and learning professional roles contributes to an understanding of the changing roles and identities of teaching and learning professionals, however it is still emerging and predominately U.S. and U.K based. In contrast the constructs of power and influence are well established; however there is no literature that explores the power sources or influence tactics of teaching and learning professionals.

### ***2.5.1 Pulling it all together - Roles, Identity and Power***

An underpinning assumption of this study is that teaching and learning professionals occupy a change oriented role that requires influence to accomplish their tasks. Furthermore, it is argued that to understand their influence attempts and perceived power bases there is value in considering the link to roles and identity.

An ongoing relationship between roles, identity and power is envisioned as follows:

**Figure 4: Envisioned Relationship between Roles, Identity and Power**



In this view, the incumbents' role perception is initially informed by structures, such as the organisational hierarchy and a job description, as well as past knowledge, organisational narratives and socialisation processes. In turn, their role perception informs their identity work, in the ongoing quest to understand, "Who am I?" and, "Who are they?" Their identity, both consciously and subconsciously, informs their influence attempts and action via their sense making of perceived power bases and possible influence tactics that they have available to them to accomplish their goals. How the teaching and learning professional perceives their interactions with others and the outcomes resulting from their influence attempts further informs and possibly modifies their evolving role perception. This is seen as an ongoing cycle with sense making and social interaction playing a large part in how individuals perceive their roles, identities and power bases. This study leverages these acknowledged links between roles, identities and social power to explore the evolving work of teaching and learning professionals in a way not previously studied.

As demonstrated in this chapter, the research questions are linked to the literature. Moreover they are drawn from the core research question and will generate interview questions for collection of data. This will be discussed in more detail in the next chapter, which discusses the philosophical underpinnings, methodology and research design of the study.

## ***Chapter 3 – Methodology and Methods***

### ***3.1 Introduction***

The intention of this chapter is to describe and justify the research design methodology and method choices I<sup>4</sup> made in an effort to best answer my research questions. "Research designs are about organizing research activity, including the collection of data, in ways that are most likely to achieve the research aims" (Easterby-Smith et al., 2008, p.82). This chapter describes how a qualitative, cross-sectional study, informed by the literature review and based on a grounded theory approach was adopted to describe and explore how the roles, identities and power bases of teaching and learning professionals are evolving. Twenty-eight teaching and learning professionals in three broad classifications from 19 unique Canadian higher education institutions were interviewed. Through a combination of structured and semi-structured questions, data was collected to both describe the formal structures and roles and elicit understandings regarding how the individuals saw their roles, identities and power bases. With permission of the participants, the interviews were systematically recorded, transcribed and subjected to line-by-line analysis and coding using a grounded approach.

This chapter is organized as follows. First the research approach which includes the philosophical underpinnings of the study and the methodology are explored. Then the research design is discussed. Next the research methods including: data collection, ethical considerations and data analysis are shared. Finally some concluding remarks on the methodology and methods are offered.

### ***3.2 Research Approach***

When planning an empirical study, a key consideration is how reality will be defined within the context of the subject being investigated, and the design strategy most likely to garner useful information. I adopted a social constructionist position, as it acknowledges the role of the individual in actively creating (or constructing) social reality through social interaction. A qualitative approach and a grounded theory methodology provided me the greatest opportunity to deeply explore the contextual aspects of the environment and its participants, and to consider emerging themes holistically. Discussion regarding each of these decisions is provided in turn below.

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<sup>4</sup> The first person is used in this chapter to indicate the active participation of the author as researcher in the study that is being described.

### ***3.3.1 Philosophical Position***

Philosophical positions have significant implications for research design. In this study I have used the lenses of authors such as Berger and Luckman (1966) and Shotter (1993) who focus on the ways that people make sense of the world through sharing their experiences with others *via* the medium of language (Easterby-Smith et al., 2008). This is consistent with my interpretist approach and social constructionist epistemological position.

There exists an ongoing debate between two contrasting traditions of how social science research should be conducted, that of positivism and that of social constructionism. The basic idea of positivism is that the social world exists externally, and that its properties should be measured through objective methods, rather than being inferred subjectively. Social constructionism, on the other hand, stems from the view that 'reality' is not objective and exterior but is socially constructed and given meaning by people (Easterby-Smith et al., 2008).

On the surface, positivism and social constructionism may appear to be two fundamentally different philosophies, belonging in different compartments. However McNeil (2005) argues that there is value in considering positivist and constructionist research styles as being two ends of a scale or continuum. Along this scale, there are a variety of tradeoffs. In social research there are tradeoffs between the number of people studied and how involved the researcher becomes personally with them - the higher the level of personal involvement, the fewer the number of people who can be studied. Other key tradeoffs are between reliability and representativeness on the one hand and validity on the other. Some authors have argued that constructionists have gone too far in abandoning scientific procedures of verification and suggest that subjective reports may be incomplete and misleading (Cohen et al., 2011). A positivist will point out the dangers of biases and unreliability in constructionist methods. Whereas the constructionist may concede this, but argue representativeness is irrelevant if the results are invalid in the first place (McNeill, 2005).

Berger and Luckman (1966) argue that social reality is not out there, waiting to be experienced by social actors, even though it may sometimes feel as though it is. Instead, social reality is actively created (or constructed) through social interaction. Reality is not objective or external, but is a construction of shared meanings and interpretations. As Robson (2002) and Bryman and Bell (2007) suggest, constructivist researchers struggle

with the idea of an objective 'known' reality but instead seek to understand different socially constructed meanings. Gabriel, Fineman and Sims (2000) for example clarify that social constructionism "...puts interacting individuals at the centre of their own universe as architects, more or less, of their own world views and meaning systems" and argue that social constructionists believe that "...when people act they do so on the basis of intersubjective understandings of a particular situation" that "...they define the situation in interaction, or negotiation, with others" (p.354).

Further, what emerges from the social constructionist view of roles, identity and power is the importance of human agency, a belief that individuals actively interpret organisational structures and social situations which lead them to behave in ways they deem appropriate to the context. The individuals' role, identity and power bases are in turn shaped by their interaction with others. Through the process of research we can describe these shared meanings, which may make it possible to explain why people behave as they do (Burr, 1995). Hence, in this study, I allowed research participants to articulate how they constructed their own realities of their role, identity and power in relation to other institutional colleagues and the meaning those experiences held for them. My subsequent interpretation of their interpretation of these experiences then enabled me to consider alternative explanations of how their roles, identities and power bases are evolving. As Fineman (1993) argues "interpretation is a cornerstone to social constructionist thought" (p.11).

As an interpretive researcher, I am an active creator of the research. I believe the interviewees and I jointly create knowledge through discussion and reflection on their experiences. I do not believe I can be extricated from the process as there is a closely intertwined relationship between the researcher and those being researched (Cohen et al., 2011). I also recognize that I cannot conduct research in a wholly value-free manner, but that as a social actor myself, my experiences, views, values and biases inevitably bring some subjectivity to the research process. What is critical is that I recognize this and make conscious efforts to minimize this impact (Cunliffe, 2002, Easterby-Smith and Malina, 1999). Therefore, I have attempted to be reflexive and transparent about my own subjectivity throughout this study.

The following sections describe the alignment between my philosophical position, research approach and research methodology. Specifically, I explain why I used a

qualitative approach and grounded theory methodology to answer my research questions.

### ***3.3.2 Choosing a Qualitative Approach and a Grounded Theory Methodology***

The most central characteristic of qualitative, in contrast to quantitative, research is its emphasis on the perspective of the individual being studied and its emphasis on “the interpretation of observation in accordance with the subjects’ own understandings” (Bryman, 2012, pg. 135). The language of qualitative research is marked by such words as “exploration,” “meaning,” “naturalistic,” and “thematic.” Advocates of qualitative research focus on context and tend to provide a good sense of what the organisation is like whereas quantitative studies tend to give little attention to context. Qualitative research also puts significant emphasis on the process and how the events unfold over time (Bryman, 2012). I believe the process of how the roles, identities and power sources have unfolded over time and the associated experiences of the participants within their respective context is paramount in understanding their social reality. For these reasons, I was guided towards qualitative methodologies and methods.

The term “methodology” is defined by Kaplan (1964, pg. 18) as “the study –the description, the explanation, and the justification – of methods and not the methods themselves”. Qualitative research studies in management and various social sciences can revolve around different research methodologies such as: grounded theory approaches, narrative, life histories, testimonials, and biographical methodologies, various ethnographies, participatory action research traditions, various phenomenological or phenomenographic traditions and case study approaches (Carter and Little, 2007). Choosing the most appropriate research methodology is tied to both the epistemological position and most importantly to the research questions. Yin (2003) suggests case study methods are suitable to answer ‘why’ and ‘how’ types of questions, as the researcher needs to have an in-depth understanding of particular phenomena and the contexts in which these phenomena occur. While this recommendation might lead one to choose a case study method to answer my ‘how’ research questions, I instead chose a grounded theory methodology. I believed that I had adequate contextual knowledge and that a cross-sectional study may uncover unique patterns of understanding or experience in the field that may not be visible in a case study design. Moreover, a cross sectional design would extend the reliability of the findings and increase the generalizability. Next, I will



describe grounded theory methodologies and elaborate on the approach I have taken in utilising grounded theory in this study.

### ***3.3.3 Grounded Theory***

“Grounded theory is a general methodology for developing theory that is grounded in data systematically gathered and analyzed” (Strauss and Corbin, 1998). Grounded theory’s aim is to explore basic social processes and to understand the multiplicity of interactions that produces variation in that process (Heath and Cowley, 2004). Using a grounded theory approach, theory evolves during actual research, and it does this through looking at the same event or process in different settings or situations (Easterby-Smith et al., 2008). The “interplay between analysis and data collection” (Strauss and Corbin, 1994) and the constant comparison (Glaser and Strauss, 1967) between induced concepts and emerging theory to the data is a central feature of this approach.

Fundamental to grounded theory is the belief that knowledge may be increased by generating new theories rather than only analyzing data within existing ones. Strauss and Corbin (1998) argue that, “theory derived from data is more likely to resemble the ‘reality’ than is theory derived by putting together a series of concepts based on experience or solely through speculation (how one thinks things ought to work). They further contest that because grounded theories are drawn from data that they are likely to offer insight, enhance understanding, and provide a meaningful guide to action (Strauss and Corbin, 1998).

There are, however, different versions of grounded theory, which primarily follow one of two quite renowned authors on the subject. There exists a rather harsh debate between Barney Glaser and Anselm Strauss, ironically the same two who co-authored the seminal work on this approach in 1967. In essence, Glaser starts with a more realist ontology and now believes that the researcher should maintain distance and independence, should start with no presuppositions, and should allow ideas to ‘emerge’ from the data (Easterby-Smith et al., 2008, Douglas, 2003, Glaser, 1999). Whereas Strauss starts from a more relativist ontology, seeing reality and experience as constructed (Easterby-Smith et al., 2008). He recommends familiarizing oneself with prior research and using a more structured process to make sense of the data (Strauss and Corbin, 1998). The methodology, methods and techniques in this study are more aligned with the Strauss and Corbin (1998) view.

These ideas, that the social world is subject to negotiation between the social actors creating it is consistent with my interpretist approach and social constructionist epistemological position, in that I did not assume any pre-existing reality (Easterby-Smith et al., 2008) regarding how the roles, identities and power sources of teaching and learning professionals are evolving. I did, however, leverage my personal experience and the theory and findings discussed in the literature review to inform the lines of inquiry for this study.

Additional details regarding how grounded theory approaches are utilized in this study are discussed in both the research design and research methods sections which follow.

### ***3.3 Research Design***

The central principle guiding the research design was to underpin the three research questions and focus on generating appropriate data to answer them. The central aim of this research is to develop a greater understanding of how the roles, identity and power bases of teaching and learning professionals are evolving. To fulfil this aim, a qualitative, cross-sectional study, informed by the literature review and based on a grounded theory approach was designed.

#### ***3.3.2 Outline of the Research Design***

Twenty eight one-on-one interviews were conducted across 19 higher education institutions located in eight different Canadian provinces. This included representation across three general categories of teaching and learning professionals: (1) senior respondents (director/manager), (2) educational developer respondents (junior and mid-level respondents focused on areas such as instructional development and/or programme and curriculum planning) and (3) educational technology respondents (junior and mid-level respondents specifically focused on blended or online learning) with representation from different institutional sizes, different research/teaching orientations and different geographical locations across all three groups. I specified the criteria used to select participants for the study, but the number of interviews sought was not predetermined. Instead, consistent with the grounded theory approach, an ongoing iterative process between data collection and analysis with an emphasis on quality rather than quantity was utilized. The objective was not to maximize numbers but to become 'saturated' with information on the topics (Strauss and Corbin, 1998).

### 3.3.3 Designing a Cross-sectional View

A key component of the research design was acquiring data from a cross section of teaching and learning professionals. The design framework was based on purposively selecting participants to provide a representative sample, which in turn would enable data comparisons to identify common themes and patterns that may have generalisable implications.

I leveraged the literature as well as my knowledge of and experience within the Canadian higher education system to identify the key characteristics of the desired sample. I recognised both individual role categories and institutional level variables as relevant to ensure representative participant selection. As described in the literature review, teaching and learning professional roles are growing in variety and scope. Based on this information, I determined exploring the roles, identities and power bases from the perspective of individuals holding positions at different hierarchical levels would be relevant. Initially, I identified only two primary categories, based on hierarchical levels (senior and mid/junior). However my experience, in Canadian higher education, indicated a significant boundary or differentiation between teaching and learning professionals who focus in the area of educational technology versus other teaching and learning professionals. Therefore, I purposefully delineated and sought out a group of individuals focused on integrating technology into learning design and pedagogy (as compared to technical support of learning management platforms such as Blackboard, Moodle, etc.) to explore this difference. Based on my knowledge and experience, I considered three variables as possibly relevant at the institutional level: the institutional focus (teaching/research), the institution size and the geographical location. Geographical location was deemed relevant as the Canadian education sector is under provincial purview; consequently institutions in each province are impacted by different legislation and different government steering efforts.

The literature review findings and my experience indicated these categories are relevant and would assist in creating a cross sectional view, however it is important to acknowledge the limitation of these categorisation or labelling schemes. These categories are not able to take into account many of the variances in both higher education institutions and the unique ways which individual teaching and learning professional roles are evolving. For example, the senior teaching and learning professional at a small university may be a sole contributor, with role tasks spanning from individual faculty

consultations to strategic committee involvement. Whereas, at a large institution, the senior teaching and learning professional may have a large reporting team with multiple departments specialising on a variety of different tasks. Therefore sub-units may focus on traditional instructional education, graduate student education, curriculum and programme planning, or online technology and innovation. Moreover, it may be valid to contest the narrow labels of *research* or *teaching* focused. This area like many other organisational labels tends to be a spectrum, with each institution and, potentially, each academic department within the institution, locating itself somewhere along that spectrum. Hence any comparisons and conclusions drawn based on these categories must be made with reflection and caution.

### ***3.3.4 Use of Existing Theory***

Consistent with a grounded approach, I focused on the theory that emerged from the data rather than *a priori* theory. The process of observing, recoding, analysing, reflecting, dialoguing and rethinking were essential parts of the research process. Yet, as noted earlier, there are concepts that guided my research questions. These included the constructs of identity and its intertwined relationship with roles and action, *third space* theory (Whitchurch, 2008c) and its focus on organisational boundaries and structure and finally power and influence theories which inform action choices. The existing literature provided me a number of different lenses that allowed me to view the situation, but each lens by itself did not provide a clear view. Elements of these concepts, theories and models provided a theoretical frame for the research design and informed lines of inquiry used for data collection but did not limit the opportunity for exploration of emerging themes and ideas.

In summary, the research approach, methodology and design are philosophically aligned and theoretically suitable to answer my research questions, which provided a strong foundation from which to launch my study. The following section describes the research methods used to collect and analyse data for this study.

## ***3.4 Research Methods***

The primary data collection mechanism for this study was *via* interviews with teaching and learning professionals. The interview topic guide was primarily influenced by three things: it leveraged an interview topic guide designed by Whitchurch (2008c, 2009), was informed by the literature and grounded by the research questions. The study

participants include a total of 28 teaching and learning professionals from 19 unique institutions spanning eight of the ten provinces in Canada. Individuals at different hierarchical levels, with different focuses (e.g. online learning), working at different sized institutions with different general orientations (research focused, teaching focused) were purposefully sought and are represented. The data were analysed using a grounded theory approach.

This section describes both the methods decisions and how they were implemented. It is organized as follows: first decisions regarding the data collection method are shared, then details regarding how individual participants were selected and how access to participants was secured are discussed, next data collection processes and some reflections regarding the data collection process are offered, and finally the data analysis procedures are discussed.

### ***3.4.1 Data Collection Method***

Qualitative research is typically associated with three main methods of data collection: participant observation, unstructured and semi-structured interviewing and the examination of documents (Bryman, 2012). As participant observation typically comprises the fairly prolonged immersion of the researcher in the context (Bryman, 2012) it has not been considered a viable method for this study due to logistical, time and cost reasons. While multiple person interviews have many positive attributes, they have been criticized for only offering a shallow insight into a topic, particularly when compared with individual interviews (Hopkins, 2007). Additionally, personal information and experiences may be withheld from a focus group discussion and certain personalities may take over the discussion (Hollander, 2004). This study required some depth and candid individual perspectives on potentially sensitive topics; therefore focus group methods were not utilized. One-on-one interviews can be done in a wide variety of ways, they can be structured, semi-structured or non-structured, or a combination of all three. To support this study, I decided a combination of both structured and semi-structured questions would be most suitable to answer my research questions.

I leveraged an interview guide designed by Whitchurch (2008c, 2009) to explore the identities and roles of *blended* higher education professionals as a starting point to create my interview guide questions and topics. Next, informed by the literature review, additional topics regarding the themes of power and influence were added. Finally, the

language and terminology was modified to reflect the Canadian higher education system. A copy of the interview guide is provided in Appendix A. Structured questions were used to gather objective data regarding the roles (reporting structures, job classifications, job descriptions, etc.) and the individual (gender, career trajectory, academic qualifications, professional qualifications, professional association involvement, etc.). Obviously, the research questions regarding the perspectives of participants could not be adequately explored *via* structured interviews alone. The qualitative data captured in this study came from semi-structured interview questions regarding the roles, identity and power of individual teaching and learning professionals.

Less structured interviews are a very good way of accessing the interviewees' perceptions, meanings, definitions of situations, and constructions of reality (Punch, 2005). "It is, probably, the most widely employed method in qualitative research" (Bryman, 2004). The semi-structured format allowed me to create a general plan of inquiry, but not a formal set of questions which, in turn, gave me the flexibility to direct or steer the conversation to specific lines of inquiry.

The following section describes how participants for the interviews were selected.

### ***3.4.2 Selecting Participants***

As described in the research design, participants were sought based on both individual role and institutional factors. Generally, I was looking for three groups of teaching and learning professionals (1) senior respondents (director/manager), (2) educational development respondents (junior and mid-level respondents focused on areas such as instructional development and/or programme and curriculum planning) and (3) educational technologist respondents (junior and mid-level respondents) with representation from different institutional sizes, research/teaching orientations and geographical locations across all three groups.

I identified all of the study participants, except for two, *via* internet research. The two exceptions were referrals from one participant to another. I did not know any of the invited participants. I started by locating all the Canadian higher education institutions listed in the Association of Universities and Colleges of Canada (AUCC), which lists the institutions by province (98 in total). My experience in Canadian higher education allowed me to quickly label many of the institutions as either "teaching focused" or "research focused" and either "small", "medium" or "large" institutions (based on full-time student

equivalent enrolment). For those institutions I was uncertain about, institutional mission statements and research rankings were used to determine focus and size was determined by enrolment data provided on institutional websites. Next, I utilized institutional websites to identify individuals in teaching and learning roles. I am familiar with common educational development unit department names and common job titles for teaching and learning professionals in Canada. This knowledge allowed me to relatively easily locate my first round of potential participants.

### ***3.4.3 Securing Access and Managing Participant Distribution***

While I was easily able to locate potential participants, a challenge I faced was finding teaching and learning professionals who were willing and able to make time to talk to me. Initially, I sent out forty distributed 'cold call' emails, distributed amongst the three general groups. When making contact with teaching and learning professionals I was also aware that they did not 'know' me and might therefore be sceptical about what I wanted. Hence I sent a short and concise introductory email (see Appendix B) with general information regarding the study topic, the expected involvement of a one hour interview and requested permission to contact them to set up an interview. I also attached a participant consent form (see Appendix C). Of the first forty requests, eleven agreed to participate. For those that agreed, a second email was sent that thanked them for their willingness to participate and proposed a selection of potential timeslots for the interview during the upcoming weeks and again the participant consent form was attached. As the respondents themselves chose to participate or to decline the invitation, there is, of course, the risk that the views of those participants who opted not to participate are not represented.

In parallel, I continued my internet research and established a longer list of potential participants from a variety of sources, primarily institutional websites, linkedin (a professional social networking site) and the Canadian Society for Teaching and Learning website. As each new participant agreed to be interviewed, the overall potential interviewee list and general distribution of participants relative to the desired cross section was reviewed before more 'cold call' email requests were sent out. One issue that did arise related to referrals. As mentioned earlier, two respondents were referrals from one participant to another. I struggled with the issue of whether or not to reveal my 'source' since this could signal breach of confidentiality and anonymity. However, my referees insisted I did this and new contacts seemed to expect it.

The following tables provide additional information regarding the study participant distribution.

**Table 3: Participant Distribution**

General Categories	Total Participants	# of Institutions <sup>5</sup>	Small Sized Institutions	Medium Sized Institutions	Large Sized Institutions	Teaching Oriented	Research Oriented
Senior Respondents	8	8	2	3	3	4	4
Educational Developer Respondents	10	8	2	4	4	4	6
Educational Technology Respondents	10	6	1	3	6	3	7

**Table 4: Participant Distribution by Province**

	BC	AB	SA	MA	ON	QU	NS	NB
Number of Participants	7	5	5	1	6	1	2	1

The following section describes how data was collected from participants.

### ***3.4.4 Data Collection Process***

As noted earlier, the majority of data was collected *via* interviews. Based on my work experience and participation in the same higher education system I was able to build common understandings very quickly with the research participants. However, to acquire a better understanding of the role and context and to triangulate some of the narrative interview data, where possible, I acquired participant job descriptions or position postings and reviewed institutional website data regarding institutional mission/vision and organizational structure/design. While the data collection happened concurrently with ongoing analysis and reflections, the participant selection, interviews and transcription took place in three waves between July and November 2012. The interviews ranged between forty minutes and one hour thirty-five minutes and were, on average, one hour and seven minutes. I took field notes during all the interviews. Moreover, with the permission of the participants, all interviews were recorded and transcribed by a

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<sup>5</sup> At 4 institutions members of different categories from the same institution participated in the study.



transcriptionist. The following section provides additional detail and reflection regarding how this data set was acquired.

I used the first four interviews as a beta test to fine tune my interview processes. I tried giving the questions and definitions of power bases in advance, versus during the session and asking structured questions (demographic, career history and organizational design) before the semi-structured questions versus after. Two of the first four participants were given the full interview topic guide in advance of the interview. While these participants were open and seemed to share information freely, I had difficulty guiding the discussion to the key topic areas. I sensed they wanted to lead the questioning more than the two who had not received the interview guide in advance, which followed my lead and probing more willingly. I assumed it was because they did not have such clear preset expectations of where they thought the conversation was going to go. During these first interviews, I also found that asking the structured questions immediately prior to the semi-structured questions versus at the end of the interview provided me greater context to probe more effectively. Based on those experiences, I decided to ask questions verbally during the interview instead of providing the interview topic guide in advance and to ask the structured questions before the semi-structured questions.

Following the beta test interviews, I provided only the general research topics *via* the consent form prior to the interviews. Also, similar to the method used by Boogers-van Greithuijsen, Emans, Stoker and Sorge (2006) to explore power bases of consultants, I provided a very brief set of definitions regarding power bases (see Appendix D). These definitions simply named the power base constructs with very limited explication. This was done to stimulate ideas in the participant but still leave room for articulations in the answers of interviewees (Boogers-van Griethuijsen et al., 2006).

The structured questions regarding demographics, career trajectory, role title, classification and organizational reporting hierarchy were asked of all participants. The semi-structured interview guide ensured that the same themes were discussed with all participants, but provided some flexibility to allow interviewees the opportunity to develop new lines of enquiry that might be particularly relevant to exploring emergent themes. The semi-structured interview questions were divided into sections on current role and identity, relationship to colleagues, membership of the broader institutional community, external working and use of power and influence.

The semi-structured questions associated with each theme were used as a starting point, although these did vary somewhat from interview to interview. This meant that some questions were omitted in particular interviews, depending on the organizational context or individual responses. The order of questions also varied depending on the flow of the conversation. Probing and follow up questions were semi-structured as well, which created an appropriate framework of relevant flexibility. However, conscious or unconscious respondent deviation is a particular weakness where greater flexibility of response is permitted. While the semi-structured approach was effective and I was aware of my role as the interviewer in preventing respondents from straying off the subject, it is also true that the largest potential weaknesses in interviewing sits with the interviewer (Fontana and Frey, 2005). The interviewer might hinder proper communication of the questions by their questioning techniques or personal characteristics. I took care to draw out uncompromised responses, with particular consideration given to the similarity of my own professional background with some of the respondents.

My assumptions of contextual understanding were validated through the interviewing process. I was quickly able to establish rapport and confirm a shared understanding of the context *via* suitable probing and follow up questions regarding the research question topics. While my experience and background allowed me to deeply explore and analyze my research questions; these same experiences and beliefs create potential biases. During the interviews I was cautious of the danger of overreliance on my own knowledge and views as well as the risk of bias in favour of some respondents and away from others. I used my field notes to maintain integrity during the data collection. For example, when ideas occurred for potential further enquiry, I would consider whether the choice of a particular line of investigation emanated from the respondents' answers, or my own views and biases. This reflection was vital in ensuring themes were not pursued based on my personal values. I found consistently recording field notes and regularly asking myself challenging questions was helpful.

Following every interview my field notes were reviewed and emerging themes, areas of interest and impressions were documented. All interviews were recorded and transcribed by a transcriptionist. There were technical difficulties with one recording, which resulted in the loss of approximately 20 minutes of recorded data. I relied more heavily on the field notes when analyzing this one interview. Saunders *et al.* (2009) suggest that "some researchers send a copy of the transcript to the participant for final

checking” (p.485). While I recognised the possible benefits of doing this to enhance the validity of the data, I rejected the idea in this study to preserve the level of goodwill I had established with my participants. Additionally, this approach is not without its concerns. As Saunders *et al.* (2009) further point out, some interviewees when faced with a transcript may wish to correct the language used, as they are not used to seeing their ‘voice’ in print. For my research this could have diluted the authenticity of the data I sought to preserve. This concern did in fact manifest itself during the study. One respondent requested to review any direct quotes from their interview that would be published in the study. After the respondent reviewed the few quotes proposed to be included from their transcript they provided edits to “*make them a bit more grammatically sound*”. However, for the most part, the recording and subsequent transcription of the interviews allowed me to capture the interviewees’ answers in their own terms.

Due to time and cost constraints, the interviews were conducted on the telephone or *via* Skype<sup>6</sup> video conferencing. Face-to-face interviews are preferable when attempting to, “capture the meaning and interpretation of phenomena in relation to the interviewee’s worldview” (Easterby-Smith *et al.*, 2008, pg. 144). Technology assisted interviews can limit the richness of the communication channel between interviewer and interviewee. Opportunities to observe non-verbal data such as a changed facial expression or shift in eye contact are very subtle with video calls and non-existent *via* telephone calls. To improve the quality, candour and richness in the interviews, a conscious effort was made to relax the participants. This was done *via*: parroting techniques, acknowledging similar experiences and using the ‘language’ of Canadian higher education. This was not a difficult or onerous task. As a former lecturer and former higher education Director whose responsibilities included blended and online course design and support, I shared a number of similar experiences and background with most participants. I believe that this shared background and well planned interviews enabled and enhanced open mutual dialogue, vital for the flow of information, and made the best use of the limited time available.

As a check of validity and appropriateness, at the end of the interview all respondents were asked if they felt the interview questions had worked well or if they had any suggestions regarding lines of questioning. For example, at the end of the interview I

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<sup>6</sup> I relocated from Canada to the Czech Republic in autumn 2011.

asked, “Is there anything else I should be asking you?” All replied that they felt the questions were comprehensive and relevant to the subject under discussion. The questions were structured so that interviews, for the most part, naturally moved from one topic into the next. Participants were asked whether the order of the questions seemed appropriate, and they commented that the interviews “flowed” smoothly. Hence the interviews seemed to fit well to the participants “frame of reference” (Boeijs, 2010). Moreover, almost all the participants commented that they enjoyed the experience, and found it had made them reflect on their work or think about their role in a new way.

### ***3.4.5 Ethical Considerations***

Thought was given to any potential ethical considerations of the research and any sensitive issues that may arise. Researchers must always think very carefully about the impact of the research, so that no harm comes to the subject of the research or to society in general (McNeill, 2005). Research should be conducted with ethical respect for: the person, knowledge, democratic values, the quality of educational research and academic freedom (British Educational Research Association, 2011). There are no ethical issues with the topic of this study or the approach taken, however the research questions themselves, especially those associated with power and influence do have some sensitivity. Therefore it was important to acquire voluntary informed consent from the participants and ensure confidentiality.

Voluntary informed consent is “the condition in which participants understand and agree to their participation without any duress, prior to the research getting underway” (British Educational Research Association, 2011, p.4). As noted earlier, all participants in this study were sent a consent letter introducing my study. The letter was sent via email and I have an electronic confirmation of the participants’ voluntary informed consent. Moreover, I also reviewed the contents of the consent letter at the beginning of every interview to clarify if the participants had any questions or concerns and to again ask for permission to record the discussion and assure them of confidentiality. As the interviewees are not vulnerable in any way, and are able to give informed consent or withdraw consent at any time the overall ethical dimension to this study was relatively small.

The following section describes my decisions and processes associated with data analysis.

### **3.4.6 Data Analysis**

Like many qualitative researchers I felt overwhelmed by data (Cohen et al., 2011) and unlike the analysis of quantitative data, there are few generally agreed rules for the analysis of qualitative material (Bryman, 2012, Bryman and Bell, 2007, Morse, 1999). Data analysis is based on segmenting the data into parts, and then reassembling the data into a coherent whole (Boeije, 2010, Miles and Huberman, 1994). Reassembling the data identifies patterns and relationships, and by explaining why these may exist generates new knowledge or theory. The analysis of my interview transcripts and field notes was based on an inductive approach geared to identifying patterns in the data by means of thematic codes. "Inductive analysis means that the patterns, themes, and categories of analysis come from the data; they emerge out of the data rather than being imposed on them prior to data collection and analysis" (Patton, 1980, p.306).

Consistent with a grounded theory methodology, analysis of my data was not an isolated activity (Strauss and Corbin, 1998). It took place iteratively with my data collection, participant selection and stretched beyond data management and findings presentation to theorizing from the data toward future research ideas. As mentioned earlier interview notes were reviewed after each interview and additional field notes were made to start sorting and gathering emerging themes and ideas. I analyzed the data using the constant comparative method (Strauss and Corbin, 1998) whereby line, sentence, and paragraph segments of the transcribed interviews and field notes were reviewed to decide what codes fit the concepts suggested by the data.

Coding of the data is a way of establishing meaning in a systematic way (Punch, 2005) and helps to identify the significance of events and issues (Bryman and Bell, 2007). I started with manual *open coding* (Strauss and Corbin, 1998), my transcripts and field note data were reviewed and generally explored to establish broad ideas that seemed to be significant issues for my participants. During my first pass through the transcriptions for initial coding, I used the audio recording alongside the transcripts to ensure accuracy and refresh my memory of the nuances of the conversation. I judged what constituted 'codes' by reference to my interpretation of the literature and my research questions. However, in those early stages I did not rule anything out. Although the potential relevance of some issues to my research questions was not immediately apparent, the issues themselves were clearly significant to the participants. More specifically, the data was tracked and coded in Microsoft Word tables. Transcriptions were pasted into a table, maintaining a

category legend in a separate document. As individual transcriptions were reviewed verbatim text from the transcripts were highlighted and colour coded on screen then labelled with initial codes. This was an iterative process, going between the transcript, notes, audio recordings and the literature. I also looked for and coded data that supported and challenged existing knowledge (Eisenhardt, 1989). For example, U.K. based literature indicated teaching and learning professionals perceived a weak external network, whereas most of the participants in this study spoke clearly about how the strong teaching and learning professional associations made a significant impact on both their practice and sense of identity.

This was then developed further by *focused coding* (Easterby-Smith et al., 2008), in which the properties of the categories were examined more fully to determine which elements of the research were the dominant ones, and which were the less important ones. In essence, many of the original open codes were clustered or collapsed under emerging dominant concepts and themes. This enabled an initial exploration of potential concepts, as well as a secondary purpose of reducing and reorganising the data set. The key themes that emerged at this stage involved role clarity, role overlap, organizational structure, issues around establishing relationships, institutional sub-cultures, boundary spanning/middle man identity, communication, influence strategies and influence enablers.

These two stages led to a final stage of *theoretical coding* (Easterby-Smith et al., 2008) and linking of patterns between the emerging concepts. The primary themes of fundamental significance to the core research question were identified, such as the consolidation and growth of teaching and learning into 'centres', an emerging teaching and learning professional identity underpinned by a shared purpose and shared values, the importance of status and reputation as precursors to influence and the linkage between influence strategies and the level (individual, departmental, or organizational) of the influence target. In sum, themes gradually emerged as a result of the combined process of becoming intimate with the data, making logical associations with the interview questions, and considering what was learned during the initial review of the literature. This process enabled the data to be reassembled in order to answer the research questions.

### ***3.5 Concluding Remarks on the Methodology and Methods***

This chapter has detailed the thinking behind my research approach, design and methods as well as how I implemented those thoughts and plans. Informed by the literature review, research questions were established to explore how the roles, identities and power bases of teaching and learning professionals are evolving. Consistent with my social constructionist viewpoint, a qualitative, cross-sectional study, based on a grounded theory methodology was designed. The data collection methods were developed with ongoing reference to answering the research questions, which themselves are grounded in the literature review. The interviews, from a group of 28 teaching and learning professionals, in three broad classifications, spanning 19 Canadian higher education institutions generated large amounts of rich data. A structured grounded approach to data analysis enabled the data to be reassembled in order to answer the research questions. These elements together have maximized the opportunities to generate useful findings, which will be discussed in the next chapter.

## ***Chapter 4 – Findings and Interpretation***

### ***4.1 Introduction***

To appropriately contextualise this work, this chapter will first provide a brief introduction to the Canadian higher education landscape. Then provide a summary of the key findings of the study, set against the three research questions that guided the investigation:

- (1) How are teaching and learning professional roles evolving?
- (2) How do teaching and learning professionals perceive their identity?
- (3) How do teaching and learning professionals generate power and influence?

### ***4.2 Higher Education Landscape in Canada***

Canada is a federal state comprising of ten provinces and three territories. There is no federal or national department of education. The Canadian constitution assigns responsibility for education at all levels to the provinces – from elementary school through graduate school. Each province establishes its own policies, institutional frameworks and funding models. The provincial jurisdictional authority also encompasses the employment standards and labour relations for the education sector. Moreover, within this decentralised model of education control, Federal Government interference in educational policy issues has been strongly resisted by the provinces (Jones, 2009, Skolnik, 2005).

Although no formal national policy exists in the education sector in Canada, there does exist a Council of Education Ministers Canada (CMEC), which consists of government ministry representation from each of the provinces and territories. The committees of this council, known as Pan-Canadian Council Committees, attempt to address and put forth recommendations on issues of national concern. However, the council has no binding decision making authority and the provinces and territories vary in the degree of compliance to the words the CMEC approves in Pan-Canadian meetings (Baker, 2007).

There is no federal or national accreditation body. Whilst the lack of a federal or national accreditation body, is a distinguishing feature in the Canadian higher education landscape, there is one national association that has played a major role in institutional recognition. The Association of Universities and Colleges of Canada (AUCC), although it is



not mandated to do so, has become the *de facto* national accreditation body. AUCC was established in 1911, originally as the National Conference of Canadian Universities, consisting of a group of university presidents. In 1965, the AUCC was incorporated by the Canadian Parliament and currently represents 95 Canadian public and private not-for-profit universities and university-degree level colleges (Association of Universities and Colleges of Canada, 2012).

#### ***4.2.1 Universities in Canada***

At a national level, Canada evolved with two very distinct post-secondary sectors, universities and everyone else (community colleges, polytechnics, and specialty institutions). While the non-university sector in Canada has been described as having significant system, structural and programmatic diversity (Skolnik, 1986), Jones (2000) provides compelling evidence to conclude that while significant diversity exists in the non-university sector, the university sector is relatively homogeneous from a system and structural perspective. The typical “Canadian model” of a university, can be found in all Canadian provinces. The typical Canadian university is a publicly funded, secular, highly autonomous institution that has both teaching and research functions. It usually offers a range of undergraduate and professional degree programmes and most offer graduate degree programmes (Jones, 2000).

This historical lack of institutional diversity in universities has recently been challenged. Similar to the post-1992 universities in the U.K. (Shattock, 1999), in the western Canadian provinces of British Columbia and Alberta, the provincial governments have created seven new universities in the last five years. These new universities stem from different roots than traditional universities; most were historically community colleges that, prior to the University title, had been offering applied and/or non-applied baccalaureate degrees for five to ten years in a variety of disciplines.

In Canada, there is also a subtle, but yet significant difference in how universities are structured and the identities formed when compared to universities in the U.K. In Canada, universities, while publicly funded, are separate and distinct from the public sector. Employee mobility between public sector (i.e. government) organisations and post secondary institutions has never been facilitated *via* common collective agreements or common position classifications.

The Canadian education sector is also highly unionised. The Canadian labour market is approximately 30.9% unionised, ranging from the high of 38.9% in Quebec to the low of 25% in Alberta (Employment and Social Development Canada, 2011). Interestingly, in Canada the education sector is more highly unionised than any other sector at just under 70%. Slightly higher than even public administration and utilities (Canada, 2009). For example, the University of Toronto has 21 collective agreements tied to 12 different unions as well as a Faculty Association (University of Toronto, 2010).

Each post-secondary institution has evolved with its own set of position classifications, job descriptions and pay bands for administration, faculty and support staff. For example, in Alberta, the Post-Secondary Learning Act and its precursors, the Colleges Act and Universities Act legislate that, “The Lieutenant Governor in Council shall by order establish an academic staff association for each public post-secondary institution ...” (Ministry of Innovation and Advanced Education, 2003, p. 52). However, there is little consistency on what roles and positions have been included as “academic staff” at different institutions. Some collective agreements include librarians and counsellors, some do not. Some agreements include those who direct or supervise the work of academic staff, such as Vice-Deans, Deans and Vice-President Academic, others do not. Unions exist at all Canadian universities, however the amount of unionisation varies from institution to institution with the extreme being the very large research intensive University of Alberta, where 100% of the employees are unionised.

It is within this context that the following findings and interpretation are presented.

### ***4.3 How the Roles of Teaching and Learning Professionals are Evolving***

A summary of the key findings in relation to how the roles of teaching and learning professionals are evolving reflect a number of changes and some tensions associated with the general purpose of the work, organisational structure, role design and role classification.

The following table summarized the role evolution findings.

**Table 5: Role Evolution Findings Themes**

<b>Role Evolution Findings:</b>
<ul style="list-style-type: none"> <li>• Growth and consolidation</li> <li>• Reporting hierarchy/institutional reporting location</li> <li>• Physical location and space</li> <li>• General purpose of work</li> <li>• Factors influencing growth</li> <li>• Creation of new roles</li> <li>• Shifting duties and higher credentials</li> <li>• Role classification and pay scale tensions</li> </ul>

### ***4.3.1 Growth and Consolidation***

All respondents, except for one, indicated their department was one of the few groups in their institutions that had experienced growth in the last five years. Moreover institutions have consolidated functions into a centralized department typically called a “centre”. Twenty seven of 28 respondents were currently working within a centre. The most commonly described groups or functions that had been merged into the centres were teaching and learning professionals from individual schools/academic departments, online learning functions, and a variety of student support functions, such as teaching assistant training, graduate student training, general student writing or student math support.

*“We started with twenty in the Office of Learning Technology, then we merged with another group of teaching academics, then we became about forty something, then we started hiring students as well as other student support groups were brought in...it is now about sixty to seventy people in our centre.” (Educational Technology Post #4)*

In larger institutions respondents identified the school of medicine and the school of business as frequently resisting centralization pressures and maintaining their own “in-house” teaching and learning personnel. Respondents indicated that these departments had the political power and ability to self-fund the work which in turn enabled them to resist centralisation pressures. While two interviewees acknowledged the specialised nature of clinical teaching, respondents commented that this discrepancy did create tensions which related to consistency of practices and internal equity.

*“...we describe the school of medicine as the school of money. Money, these days, buys you the power to do what you want.” (Educational Technology Post #9)*

When asked if it was preferable for teaching and learning professionals to be centralized within a centre or dispersed in various departments, all of the respondents indicated that a centralized centre was most desirable. The general view was that centrality assisted them to maintain a more neutral position as well as further their personal professional development.

*"I have colleagues to talk to, brainstorm with, to grow from in a centralized unit."*  
(Educational Development Post #3)

*"...being with the Centre, you don't get tied into those programme politics. You're kind of above that and outside of that. You can sometimes work around things that you wouldn't be able to work through if you were actually in a programme."*(Educational Technology Post #6)

Moreover, senior respondents commented that responsibility for a larger, centralized team gave them more power and influence in their organisations.

A couple respondents, that had previously been located in academic departments, and the one respondent reporting to a Business Department Associate Dean did recognise some negative aspects of centralizing teaching and learning work. They commented on reduced access to faculty and the importance of the Dean's support to make changes within the department. Moreover, they commented on the value of understanding the priorities of the individual faculty groups they are working with.

*"When you are situated within specific faculties, you are able to have a lot of direct access to individual faculty members."* (Educational Technology Post #5)

*"When you're centralized, you can start to forget that other people don't think like you think...our unit puts teaching and learning as a high priority all the time, it's sometimes hard to remind yourself that isn't necessarily everybody's priority."* (Educational Development Post #8)

#### **4.3.2 Reporting Hierarchy/Institutional Reporting Location**

All respondents, except for the one respondent reporting to a Business School, indicated they and their centre reported up through the Senior Academic Officer (Provost and/or Vice-President Academic are the common titles). Most of the senior respondents reported directly to the Senior Academic Officer. A few respondents indicated that when

their centres were first established that they reported to other, less desirable locations, such as the Faculty of Education, Library Services, the Chief Information Office or Student Services. While reporting up through the Senior Academic Officer was obviously a change for many who had been consolidated into the centre from elsewhere in the institution, all respondents described this reporting location as very desirable. Respondents indicated that the access to and support from the Senior Academic Officer provided significant credibility and influence.

*“Initially my position reported to the Vice President of Student Services ...and then I was reporting directly to the Vice President Academic. That just lent enormous credibility without my having to do anything. And this particular VP Academic makes it really clear that he values my office. So in the political landscape of the institution, it’s so important. And trading stories with my colleague, I think those who report to a really senior level manager, we have the protection of that office, but we also have sort of built in credibility.” (Senior Teaching and Learning Post #3)*

Respondents also described that they felt it was important for their work to be positioned within the academic side of the institution, but yet separate from any one academic school or department.

*“...being positioned in the academic support side of the shop...it acknowledges that teaching is a scholarly enterprise, not just a logistical one. And that it is complicated and it involves critical reflection, like all academia does.” (Educational Development Post #10)*

*“...one of the best things about our position is that we’re seen as quite distinct from any given faculty. We need that.” (Senior Teaching and Learning Post #6)*

### **4.3.3 Physical Location and Space**

Three senior respondents also commented on how the centre’s physical location, the design and the quality of space sent numerous messages regarding their work as well as institutional values and priorities. The respondents were not asked where a good physical location for a teaching and learning centre is however, six of the respondents offered that the library is an excellent physical location for a teaching and learning centre. Respondents commented that the neutrality, the academic focus, the accessibility and the visibility were all positive attributes of this location.

*“...we completely redesigned a whole new teaching and learning centre on the top floor of the library. It’s got a whole learning lounge area... a spot for them to sit and private consultation rooms. We’re really valuing the faculty and giving them a nice place to work and meet with us....what the V.P. has done for me by elevating us, almost physically, to the penthouse suite is huge. It is very symbolic...they put a lot of talk into where your office is and what kind of view you have.” (Senior Teaching and Learning Post #1)*

*“I need to have a lot of buy in from the faculty. They have to feel they own this centre so our centre is located in our library. We’re quite specifically located here so that we’ll be in a neutral zone because ... although I am an adjunct member of the faculty of education, I wouldn’t want the centre ever to be there, because it’s important that we be viewed as being neutral and transparent, that our only goal is enhancing teaching and learning within the university. Not in a specific area [department/school]...and so where we are is purposeful and that we have a transparent glass wall that leads into our offices, that is purposeful too.” (Senior Teaching and Learning Post #8)*

In contrast, the lack of desirable space was also described by respondents as sending negative messages regarding how their roles are valued within the institution.

*“We always say that...if they really value what we do, they would give us a window. So we’re sort of spread out across the institution now in terms of our staffing and where we’re housed. We’re all part of the centre, but there is no real centre.” (Educational Development Post #4)*

#### **4.3.4 Purpose of Teaching and Learning Professional Roles**

In parallel with the general trend of growth and consolidation, many respondents described a transition in the general purpose of teaching and learning work at their institutions, from that of reactive remedial support to that of proactive ongoing enhancement. This transition was also reflected in the duties and services respondents described spending their time on.

*“My role has been shifting over the years, a shift from being a place you go for remediation to a place you go for enhancement. And that’s quite a different... different view.” (Senior Teaching and Learning Post #8)*

*“One of my goals has been to change our face in the university community from something that was... from something that was a place that people went when they had a problem to more of a community where people can be part of something that is really a partnership and is more focused on prevention than on treatment if you like.” (Senior Teaching and Learning Post #6)*

#### **4.3.5 Factors Influencing Growth**

While not all provincial government ministries have the same level of focus on quality assurance deliverables and quality assurance reporting nor the same funding schemes, the overall view of respondents was that the increase in government focus on quality assurance and the increase of government funding available for online programming were two of the most important factors that impacted the recent growth, consolidation and organisational focus on teaching and learning roles.

For the most part, the government focus on quality assurance appears to have translated into a significant amount of curriculum work for teaching and learning professionals. All the senior respondents from mid-sized and large institutions and many of the small institutions indicated that they either had a person or a team of people whose primary duties centred on curriculum development and renewal.

*“The biggest growth in our centre recently has been around institutional investment in curriculum development and curriculum innovation, mainly at the programme level but also at the course level.” (Educational Development Post #2)*

Canada is a large country with its population clustered mostly along the U.S. border. As a result, geographical access to higher education has been and continues to be a fundamental issue for all provincial governments (Jones, 2009). Accordingly, many government steering programmes targeted at increased access have translated into significant funding for online and distributed programme development. Many respondents commented that their institutions were more focused on online and blended learning than they had been in the past.

All respondents, except for one whose institution was not pursuing online course development, indicated online learning and educational technology functions were part of their centre. There exists, however, a significant variation in what duties each of the centres were responsible for and where the hand off to the central department

responsible for Information and Communication Technology (ICT) takes place. Respondents from all centres involved in online provided course design (mapping learning outcomes to content and assessment) and teaching and learning support for technology integration (for example, teaching strategies for online courses). Half these respondents indicated their centre taught end user faculty courses on how to use their learning management system (such as uploading files, online grade books, etc.). The other half indicated this was either done within the ICT department or within individual academic departments. Two respondents (one senior and one educational technology) indicated with positive sentiment that their centre is responsible for managing the learning management system and other associated teaching technology in its entirety, including the servers which the systems reside on. In contrast, a few other respondents commented that it was important for the technical side of the learning technology systems to be managed elsewhere. For example, one senior respondent felt strongly about drawing a clear line between managing technology infrastructure and managing a teaching and learning centre.

*“Many learning centres in Canada have taken on the responsibility of managing the technical side of their LMS [learning management system], and when they have, it sort of overshadows everything else that they do.” (Senior Teaching and Learning Post #4)*

Some respondents, from centres that have been established for a number of years, indicated that the growth of their centre was not only impacted by the external environmental factors. They highlighted the impact of individual credibility that had been earned over time by teaching and learning professionals in their centres. Respondents elaborated that earned credibility gave their centres access to resources and broader levels of influence which resulted in consolidation and growth.

*“The centre has been around long enough now that some of the people who have been in those roles, who have achieved more credibility on campus and are being given more responsibility to have a wider impact, are more familiar with how you go about doing that.” (Educational Development Post #5)*

#### **4.3.6 Creation of New Roles**

Respondents described that new positions, at more senior levels were being created. Three of the nine senior respondents were the inaugural Directors in their institutions. A director level role focused on teaching and learning did not exist prior to their occupancy.



*“Two years ago, when I came here it was the first time they ever had a director of a teaching and learning centre, prior to that they had a faculty member in education. I was told - you’re going to get an online learning team. You’re going to get a teaching and learning centre. And you’re going to get the educational technology centre. And when you arrive, you are going to merge all those together and build a new teaching and learning centre.” (Senior Teaching and Learning Post #1)*

Moreover, four of the senior respondents commented on the recent creation of a Vice-Provost or Associate Vice-Provost position responsible for teaching and learning. Two respondents were reporting to this recently created post (for less than six months), and the other two new posts were currently being recruited for. Respondents commented that they believe a senior voice representing teaching and learning will assist them in making change within their institutions.

*“... this new position of vice provost teaching and learning, that’s really interesting, because our ability... to really make [change]... although you can make change within individuals, but to really make changes in teaching and learning, it has to come at a more of an institutional or national or international level and that’s only going to be achieved when we have people who are in those positions at a higher level within the university.” (Senior Teaching and Learning Post #6)*

#### **4.3.7 Shifting Duties and Higher Credentials**

*“All of our institutions started out as usually having one educational developer and then some bits and pieces of people. And now we’re actually seeing numerous roles developing so...we do have junior level people and then we do have associate directors and directors.” (Senior Teaching and Learning Post #5)*

The role duties for many respondents, especially those at mid-sized and large institutions, were described as changing. Respondents in all groups indicated an increased focus on research. In the case of educational technology respondents, most commented their roles were broadening. In the case of educational developer respondents, some indicated their roles were narrowing or becoming more specialised. As well, respondents described a general trend of increasing requirements for teaching and learning professionals at all levels to hold a Ph.D.

Four educational technology respondents and two senior respondents described how educational technology roles were broadening in scope and shifting from “*production oriented*” to “*development oriented*” roles. In production oriented educational technology roles the instructional technologist or instructional designer, as they were commonly called, would typically project manage a team of people, consisting of the content expert (a faculty member), a graphic designer, and a writer to transfer a face-to-face course into an online course. Respondents indicated that this type of work was very funding driven and because it was not usually initiated by the faculty course owner it was not well respected work. Whereas in development oriented educational technology roles respondents describe very similar duties to a traditional educational developer role; such as teaching instructional skills workshops and performing one-on-one consultations with faculty regarding pedagogy or teaching approaches. The difference being, development oriented educational technology roles were described as more focused on teaching issues surrounding the integration of technology.

*“Previous, as an instructional designer, I worked with faculty and we would blueprint their course and they would send me all the content and I’d build their courses for them... that’s how it worked. And now we’re much more in a consultant role...I do a lot of consulting on integrating technology...It could be blended or face-to-face or online. It could be any of those.” (Educational Technology Post #6)*

Some institutions appear to be moving away from production oriented educational technology work. Respondents from two different Universities reported that their institutions made a decision to move away from purely online course production and to focus instead on a broader task of integrating technology into teaching.

Respondents also indicated that in many of their centres programme planning and curriculum development functions have become specialised roles. Two educational development respondents commented that in the past they were responsible for programme planning and curriculum development duties and that recently a new specialist role had been created. Therefore they no longer had those duties. Other respondents, especially those working in smaller institutions, described that this work is still combined with other traditional teaching and learning professional work.

#### **4.3.7.1 Increased Focus on Research**

Respondents described a general trend towards increased expectations of involvement with research. When asked to describe their duties and work tasks, respondents described a broad range of involvement with research such as: acquiring internal and external research grants, independent research projects, collaborative research projects, regular publishing and presenting at conferences.

All but one senior respondent was actively involved in research. This includes senior respondents who were working at teaching oriented universities and many who were not in faculty posts. When senior respondents were asked what makes them successful in their roles, they indicated being involved with research contributed to their success. They commented that working with faculty on research projects helped establish an academic relationship, a relationship that helped them raise awareness of teaching and learning work as a scholarly enterprise. Moreover, two respondents in research oriented institutions indicated they have recently created teaching and learning focused research institutes housed within their centres.

*“As faculty understand more that it is legitimate research to explore teaching and learning in your discipline...[that] it’s just as legitimate in the publication world and in your academic credibility. We get to work more hand in hand with them on various projects and then to publish together and I think that makes a really big difference.” (Senior Teaching and Learning Post #7)*

This view was balanced by recognition that not all faculty members are interested in or should be conducting research and publishing in the field of teaching and learning scholarship. The main benefits appear to be linked to increasing the credibility of the individual teaching and learning professional, legitimising the work of the teaching and learning centre and encouraging faculty to reflect on their teaching practice and to approach it in a scholarly way.

Active involvement with research was less consistently reported with the other respondent groups, but it was still significant. Seven of the ten educational developer respondents and four of the ten educational technology respondents were actively involved in a variety of research activities. Two non-faculty educational technology respondents specifically commented that there was a very clear expectation to be

involved with research and it was part of their job description. Moreover, they were allocated a certain percentage of their work time (15-20%) to fulfil this requirement.

*"I'm working on some research of my own right now around the use of Twitter as a backchannel in large lecture courses. We're working closely with the instructors for those courses...so we're not necessarily consulting on how they teach, they're actually part of our research team." (Educational Technology Post #6)*

#### **4.3.7.2 Credential Creep**

Of the eight senior teaching and learning professionals interviewed, all had graduate level degrees. Six had doctoral degrees, one was soon to complete a Ph.D. and one had a Masters. Those senior respondents without a doctoral degree were working in teaching and learning positions for ten years or more. Six of the eight had one or more of their degrees in Education. All senior respondents indicated that anyone who would be considered for their role in the future would need to have a doctoral degree. Seven of the eight respondents indicated that it would be preferable that the degree be in education.

Seven of the ten educational developer respondents had doctoral degrees. The others had Master's degrees. Four of the ten educational technology respondents had doctoral degrees. The remaining had Master's degrees. These two groups also indicated that their institutions now required a Masters degree, preferably a doctorate degree when they recruited for any non-clerical role in their centre. This was described as an increased credential requirement by respondents. The change was most significant in the educational technology respondents. Educational technology respondents described a variety of technical qualifications and experience as being more important to their role in the past.

Respondents described tensions and strongly held differing views on what knowledge, skills and abilities are most important for a teaching and learning professional at any level. A number of respondents described an ongoing debate within both their centres and their professional associations surrounding the attempt to identify and document the knowledge, skills and abilities required for teaching and learning work. Respondents described that one of the key tensions that arose during this process was the belief by some that teaching and learning professional work requires a graduate level academic credential in education.

*“She [her peer] is very dismissive of my experience. She thinks her Ph.D. in education should be valued more highly. The interesting thing is that education development is not only about knowing about education. Definitely, [in this centre] they value the education credential over experience. That’s been my experience anyway, even though I have a Ph.D.” (Educational Development Post #1)*

*“What I have seen is that people are focusing on individuals with doctoral degrees in education, doctoral degrees in curriculum design and e-learning, but that... they have outstanding knowledge but don’t really have very good skills at the other side of the job. And so I think they then become very focused on expert power. And I’m not always convinced that that’s where we need to be. I think sometimes, and especially now with the focus on the scholarly activity around teaching, while [I] agree it’s extremely important, there seems to be more and more focus on that and I’m concerned that it’s going to move us away from the front line of faculty...the term I’ve heard, and I’m going to copy it and use it, is knowledge mobilization. It’s one thing to be the expert. It’s another thing to take that expertise and mobilize it in a way that’s beneficial.” (Senior Teaching and Learning Post #6)*

#### **4.3.8 Role Classification and Pay Scale Tensions**

Senior respondents described that the evolving teaching and learning roles caused numerous challenges related to inconsistent classification structures and inconsistent pay scales. The tension associated with teaching and learning professionals being classified as faculty or not as faculty was described as particularly acute.

The classification structures and pay scales for all three groups of respondents varied significantly. As discussed in the Canadian context section, most institutions have their own faculty association, and a staff association with a unique collective agreement articulating terms of work, pay and benefits. Some respondents were classified as in-scope within the faculty association; others were classified as in-scope within a supervisory or professional association, while others still were out-of-scope and classified within the management pay banding scales. These inconsistencies in structure create tensions across the field of teaching and learning in Canada and within individual higher education institutions.

*“You’re challenged because you want to hire certain skill sets that the institution doesn’t have a classification for and when you start looking across the system to other*

*institutions, it's a dogs' breakfast, a real lack of consistency...in titles, duties, pay, everything." (Senior Teaching and Learning Post #1)*

Respondents responsible for staff described the challenge of working with their human resources and labour relations teams to appropriately design and classify new teaching and learning positions. These positions are often new roles to the institution or are evolving roles however they only affect a small group of staff. Two respondents described with great frustration how difficult it was to get appropriate classification and salary bands that would enable them to attract suitable candidates for new positions they were creating. They elaborated on the difficulties of acquiring comparable positions in other institutions and the pressure from their own human resources team to just “slot them in” within an existing role description and pay scale.

*“...two associate directors, titles given only to sort of achieve the appropriate rate scheme...so no one in our unit [but me] is a faculty member.” (Senior Teaching and Learning Post #1)*

#### **4.3.8.1 Faculty or Non-faculty Posts**

The debate in the literature regarding if teaching and learning professionals should be classified as faculty members (Robertson, 2010, Sorcinelli et al., 2006) was also reflected in the findings. Moreover, this issue is further complicated in the Canadian higher education system by the autonomy and inconsistency of institutional bargaining unit structures at different institution types.

The institutional focus on teaching versus research appears to be related to the classification of senior teaching and learning professionals. All but one senior respondent working at a research focused institution were tenured (or tenure track) faculty. In teaching focused institutions, all but one senior respondent, were classified as out-of-scope (non-unionized) professional administrators. Moreover, the one senior respondent classified as faculty at a teaching focused institution indicated that she was retiring and would be replaced with a non-faculty, out-of-scope, professional administrator position. Interestingly, while this variation exists at the senior level, these respondents did not describe this as an area of tension. Only the soon to be retiring senior faculty respondent expressed any concerns regarding faculty versus administrator classification. While not fully explored in this study, it is suggested that this may be related to the differences in

managerial cultures associated with the historical roots of the institution type (see e.g. Huisman, 2000, Jones, 2009, Meek et al., 2000).

Classification as faculty or non-faculty appears to cause appreciably more tensions within the other two respondent groups: those in educational development and educational technology posts. Only two of the educational development respondents and only one educational technology respondent held a faculty classification; a total of three out of 20 respondents. Just over half of the remaining respondents in these categories were in-scope professional and supervisory staff and the others were out-of-scope professional staff. This inconsistency creates considerable tension within these groups and was identified as a major concern for respondents. Moreover, these inconsistencies created recruitment and retention challenges. This tension was described as particularly acute by respondents from research focused institutions where the director role was a faculty post. The general consensus from respondents is that their lack of a faculty classification affects their role status and in some institutions limited their ability to take on certain duties and evolve their roles in desired ways.

*“If you’re not in a faculty role, then there is a glass ceiling that actually occurs. I’ve been advocating...for the ability to achieve tenure through educational development work which is what happens in some other universities. Without faculty status ... I have less currency and universities are all about people currency.” (Education Development Post #8 - research focused institution)*

*“I really would like to see opportunities for my staff to have some sort of faculty appointments where appropriate. That’s an issue because the faculty collective agreement at our institution prevents support staff from having faculty titles ...they can teach, but they would not be allowed to supervise graduate students. It’s just a quirk in our institutional policies.” (Senior Teaching and Learning Post #4 – tenured faculty)*

During the last few years there has also been labour action at a number of Canadian universities. This has presented a situation that created added tensions in the role when the teaching and learning professional is not classified as faculty.

*“I have no union to protect me, and yet my day-to-day job is supporting [unionised] faculty. Do I walk across the strike line or do I stay at my desk and carry out the wish of my director? ...it becomes an interesting challenge.” (Educational Development Post #4 - out-of-scope Administrator)*

Respondents described that these tensions were further exacerbated by the organisational model in place at a number of universities where some teaching and learning roles in the centre were filled by rotational faculty members who, in essence, had the same duties as the non-faculty appointment member during their rotational term.

*“What happens in Canada a lot, people are seconded...the ones that are filling two year terms are seconded from faculty. The ones that have a full-time position in the centre tend not to be faculty...that causes a real rub point.” (Senior Teaching and Learning Post #5)*

Next, the key findings associated with the second research question are presented.

#### ***4.4 How Teaching and Learning Professionals Perceive their Identity***

A summary of the key findings in relation to how teaching and learning professionals perceive their identity reflect an evolving common identity underpinned by a set of shared values, strong professional association identification and a shared purpose of bridging and translating needs towards the enhancement of teaching and learning.

**Table 6: Evolution of Teaching and Learning Professional Identity Findings Themes**

<b>Evolution of Teaching and Learning Professional Identity Findings</b>
<ul style="list-style-type: none"> <li>• Shared underlying values</li> <li>• Focus on bridging interests and translating needs</li> <li>• Importance of respect and credibility</li> <li>• An external network of peers</li> <li>• Linkages to role tasks</li> <li>• Varying orientations to their change role</li> <li>• Not understood by the broader institutional community</li> </ul>

When asked what respondents see themselves as, or how they would describe themselves in their roles, respondents used a variety of labels. Respondents used terms such as *“academic”, “advocate”, “change agent”, “cheerleader”, “consultant”, “critical friend”, “educator”, “educational developer”, “facilitator”, “faculty”, “instructional designer”, “leader”, “translator”, “service provider”* and *“support”*. As these labels were probed and further described, a number of interesting overarching themes and additional



themes associated with specific respondent groups emerged. First the overarching themes and then the specific respondent group themes will be presented and interpreted.

#### **4.4.1 Shared Underlying Values**

All respondents described their work and how they saw themselves in their work role in terms of shared underlying values. Value descriptors such as “supporting”, “helping”, “caring”, “discretion” and “integrity” were commonly used.

*“Kind of an ethic of care. Kind of a person who can help others move to where they want to go. A facilitator. A lesson expert and more of a mentor at times. Or a coach, or an open-ears person who respects fundamentally the people with whom he or she works. Respects the institution of the university and respects the people who work in it as professors.” (Educational Development Post #6)*

Respondents described how these underlying values conflicted with and created tensions when their role required them to more actively measure, track and/or judge faculty work.

*“Educational developers are being asked to be the... sometimes the policing kind of arm of the administration around things like quality assurance and quality of instruction and all that. And that’s something I will keep resisting. I don’t want to be the... as one person put it, the foot soldiers of the administration.” (Educational Development Post #10)*

#### **4.4.2 Focus on Bridging Interests and Translating Needs**

The narratives of respondents indicate they see themselves as a bridge between competing interest groups. When asked what made them good at their work and what they were valued for, respondents described that they were good listeners and translators and that this enabled them to build relationships and bridge gaps between various interest groups. This activity was described at multiple levels and between numerous different stakeholders: between themselves and individual faculty members or other individual academic or service stakeholder colleagues; between themselves and the departments or groups they facilitate for and at an institutional level between themselves and executive leadership or as a representative on governance groups. Respondents spoke with pride regarding their ability to bridge various interest groups by adjusting their style and language to the individual or group they were speaking with.

*"I have to mediate within multiple constituencies almost or multiple groups of people...they come from homogenous groups [disciplines/departments] that speak a specific language...with different traditional approaches to teaching. Everybody may have a legitimate point of view, but it's my job to bring them together..." (Educational Technologist Post #5)*

*"...the multiple cultures that exist within a university. The academic culture is quite different from an administrative culture. And those two groups often have difficulty talking to each other. I think because I've been able to work on both sides and have studied both sides, I actually understand and am able to interpret and translate their perspectives to each other." (Senior Teaching and Learning Post #7)*

Respondents also described how they saw themselves as building connections across groups towards a stronger more cohesive academic community.

*"Our unit has...the ability to build bridges across... between us and them and then across between different faculties ... it's really weird, but that's the number one thing that people take away when faculty get engaged with us and they meet people from across the university. So that ability to... to build community." (Senior Teaching and Learning Post #8)*

This bridging activity was also described by respondents as one of the most challenging tensions in how they see themselves in their work. Respondents described increasing pressure for faculty at their institutions to change certain aspects of their teaching practice and that this, in some cases very direct, infringement into faculty's teaching practice had created change resistance. Further, respondents highlighted that it was very important that they be perceived by others as relatively neutral or balanced between administrative and faculty.

*"Previously...the centre of learning and teaching was there to say hey, here's a great idea you could try. It's up to you. Now it's more kind of like, this is the way it's going. You've got to get on that train and you've got to go or else it's not going to be good for you which is quite uncomfortable...and going to the Educational Developers Caucus meetings, the last [national] conference there was quite a bit of discussion around that and what is our role? Whose side are we on? I mean it kind of comes down to that. Are we on the faculty side and we are working on behalf of faculty and faculty interest or are we working on the side of the administration? As an associate director I saw us more aligned with faculty. But in a director role, I can see that... that would not be good for us*

*politically to be entirely in that role. We have to be seen to working with administration but we've got to balance that off against faculty angst about a lot of things. So it's always trying to sort of be that go between, between those two groups. It's very challenging."*  
(Educational Developer Post #1)

This tension was particularly delicate when it came to involvement with teaching evaluation. Most respondents spoke about the importance of distancing themselves from the evaluative part of the "quality movement". Although many respondents indicated that they or their centres were historically involved with this work, only one respondent indicated their centre currently administered the student teaching evaluations. Most respondents indicated that they and their centres purposefully had nothing to do with student teaching evaluations. Nor did they perform peer teaching evaluations unless the faculty member themselves invited them to do so and then the results were strictly confidential. In particular, respondents felt that distancing themselves from evaluation would enable them be seen by faculty as "honest brokers" who were marching to an "enhancement" agenda, not a punitive administrative agenda.

*"The move in most countries and the European Union is towards accountability, quality assurance, and counting things and policing outcomes, this seems to me to be wrong headed. And educational developers who are getting on that bandwagon, I think are going to do the field a disservice because they will become part of the policing function of administrating rather than about good teaching and learning. Here's the more positive spin, we can become good translators and facilitators of people's processes so that this administrative stuff and bureaucratic stuff doesn't get in the way of creativity, curiosity, basic science, basic arts, research, right? The stuff that can enliven a classroom and make students inspired...a translation role and facilitative role."*(Educational Development Post #10)

Respondents also described a tension between accountability and meaningfulness. This appears to be linked to how they interpret the interests of the various groups they work with and their personal agenda of good teaching and learning. For example, they described a tension between what the students want and how that relates to faculty goals. They described that while they wanted to encourage teaching strategies that provided the best student learning opportunities, that these did not always service the immediate interests of students or of faculty. Respondents clarified that although

students are learning, it does not always translate into the student liking the course or rating the course highly.

*“There’s a difference between the faculty goals, student goals and sometimes student learning...you can try and do all the best teaching stuff you want and it might be a very good learning experience with the students. The students might learn a lot but they might think this is an absolutely horrible course because of all the work they had to do. And while they may look back later and go, wait a minute that was the course that I learned how to do this...in terms of student evaluations it could be a disaster. And at the same time faculty might say well, how do I get my evaluations up?” (Educational Technology Post #6)*

The overarching descriptions from respondents’ narratives paint a picture of continually translating and balancing the interests of students, faculty and administrative agendas towards the overall goal of good teaching and learning.

#### ***4.4.3 Importance of Respect and Credibility***

The concepts of respect and credibility were central themes discussed by respondents in a number of contexts. As discussed earlier, they described the importance of their work being valued and respected by senior leadership (specifically the senior academic officer and the deanery). When asked to describe their relationships with institutional colleagues much of the narrative focused on the themes of having respect and credibility or an ongoing quest to earn it.

Respondents described that the respect of their department by others, most importantly faculty, and the credibility of themselves as individuals when working with departments, administrators and/or faculty members impacted how they saw themselves and their work. Respondents told stories that indicated that when they and their departments had respect and credibility that they were able “to get things done” and that their relationship with others moved more towards a “partnership”.

*“I have credibility on campus with people that I’ve worked with before because they have known me as someone who’s navigated the university and been a personally reliable and knowledgeable person. Our department too, we seem to have a lot of respect and get invited to things. So we get invited to department meetings and to these wider meetings like chairs and deans.” (Educational Development Post #6)*

In contrast, when respect and credibility are perceived to be lacking, respondents described themselves as an “*underappreciated service*”. These perceptions were accompanied by stories of frustration and roadblocks.

*“Our work isn’t respected; I have to inject myself into the academic community [laughs] if that’s a good way to put it. We’re not consulted. This office is not consulted on things where we could be, for input and feedback. So I have to actively go seeking.”*  
(Senior Teaching and Learning Post #5)

#### **4.4.4 An External Network of Peers**

Respondents described a strong identification with a broader community of practice outside their institutions. When asked who their peers are, respondents were more likely to say others doing similar work at other institutions than any other group. The second most common response was others working in their centre. As individuals identify with groups or social categories that means they define themselves at least in part according to their affiliation with them (Albert et al., 2000, Dutton and Dukerich, 1991). In other words, at least part of the respondents’ individual identity was shaped or defined by their psychological attachment (Brown, 1969) to their professional associations and their centre colleagues.

Respondents described very strong networks within regional and national professional associations. Their narratives indicated that many of their ideas and thoughts associated with their work came from membership in their professional associations. All senior respondents and most educational development and educational technology respondents belonged to the Canadian Society for Teaching and Learning. Some respondents, especially at the senior levels, were very active in a sub group called the Educational Developers Caucus. Over half the educational technology respondents also belonged to the Canadian Society for Teaching and Learning, however these respondents more often identified with other professional association colleagues from different professional associations targeted to educational technology.

*“Sure I have peers in the university, but my real peers are people in similar roles at other institutions and we’ve been together for a number of years so we’re very close-knit and it’s a really good working group and they’re a good sounding board.”* (Senior Teaching and Learning Post #5)

#### **4.4.5 Identity Linkages to Role Tasks**

The descriptors respondents used to describe what type of professional they see themselves as varied. Perhaps not surprisingly, as occupation is known to be a key identity resource (Alvesson et al., 2008), respondents' description of their professional self appears to be closely linked to what tasks or duties they spend the majority of their time on. For example, respondents who described their main tasks as working with faculty on their teaching and learning strategies were more likely to describe themselves as an *"academic"* or an *"educator"*. Respondents in these roles identified more tensions with the academic work overlap. Overall, respondents in these roles felt they had the knowledge, credentials and experience to be seen as peers in their work with faculty. However, many respondents indicated they felt faculty did not see them that way.

*"We struggle a lot with that actually because internally we feel that we have a very strong academic mission and also fairly academic personnel as well. Not really administrative personnel although they are stuck in an administrative union. Which makes for I think discomfort in terms of you know feeling like we ought to be an academic unit. We do teach courses and we train graduate students and all those other things... By others around the campus we're seen as an academic service unit. However, most of our work requires ongoing partnerships."* (Senior Teaching and Learning Post #4)

Respondents who described their main tasks as working with faculty and departments on curriculum development and renewal tended to describe themselves as a *"professional service"*, a *"consultant"*, or a *"facilitator"*.

*"I'm a consultant and resource for academic units...we position ourselves as fairly neutral to the outcome in an academic unit...I like to help them have considered best practices, considered institutional goals, considered the knowledge base of education and information about students so that they can get the best outcome for them."* (Educational Development Post # 6– curriculum focused)

Again, not being aligned with an existing agenda, but presenting and translating a balanced view regarding the needs of students, the needs of the institution (administration) and the needs of faculty was emphasised.

#### ***4.4.6 Varying Orientations to their Change Role***

There was a contrast in how the respondents oriented themselves to their change role that appears to be linked to hierarchical level. Most senior respondents described themselves as being proactive leaders of change. The educational development respondents and educational technology respondents more typically described their desire to make a difference beyond their own practice as teachers however not necessarily needing to or desiring to lead the charge of change. They saw themselves more as enablers and supporters of change than drivers of change.

*“I see myself in ...more a support role than a leadership role. And there is a... change agent component to it which I know sounds contradictory...very much from behind, supporting the wind of change.” (Educational Development Post #4)*

Five of nine senior respondents described their key task as “*advocating*” for teaching and learning. Two specifically called themselves, “*change agents*”. Some respondents described that they were required be an advocate and to prove the value of their work or their centres work because of overarching institutional cultures that did not value teaching and learning. Other respondents commented that the attitudes of senior leadership or of specific schools/departments were the impetus for their advocate role.

The schools’ institutional focus on research versus teaching, as well as their institutional history appears to impact how much emphasis senior respondents place on seeing themselves as advocates for good teaching and learning. All senior respondents at research oriented schools described themselves as advocates for teaching and learning. Whereas, respondents in the established teaching oriented schools in central and eastern Canada, those that have long positioned themselves based on teaching excellence in the University sector did not place as much emphasis on seeing themselves as an advocate. As one senior respondent from a teaching oriented school described, “*teaching and learning is part of the schools’ DNA*”.

This is not; however, the case for respondents in all teaching focused institutions. In contrast, two senior respondents from newer universities (those that evolved from the community college sector to the university sector during the last 4-7 years) did express tensions regarding the increased focus on research following their reclassification from a college to a university and although they stated new resources (people, small grants, etc.) had been provided to support teaching and learning that they felt more of a need to be an

advocate for teaching and learning than they had in the past. Respondents described that a tension between research and teaching, one that did not really exist in their past, was now becoming more obvious.

#### ***4.4.7 Not Understood in the Broader Institutional Community***

While individual respondents described a clear understanding of what capabilities and value they brought to their institutions, respondents also described a significant challenge communicating those capabilities and value to the broader institutional community. Many respondents commented on a lack of visibility or awareness regarding their roles and the services their centres provided. The overall view of respondents was that many people in their institutions did not understand their roles or what they do. This concern was particularly acute for Educational Technology respondents.

*“Most people don’t even know we exist so it’s an ongoing battle, especially with people like professional faculty who don’t have the same opportunities for news that others do and connecting to them is hard. They just don’t know that we’re here. But an amazing number of regular faculty also don’t know we exist or even what we could do for them. So that’s something that we’re always up against. Trying to connect with people...”*  
(Educational Technology Post #8)

Educational Technology respondents were also more likely than the other respondents to state that they were not respected or valued by faculty and senior leadership. They commented that they were often broad brushed as general technical support.

*“I have had this conversation with several of my colleagues who do the same thing. A lot of us have graduate degrees in education and there are days that we are more like web monkeys in that - yeah, let me just code this for you. And people still come to... whether it’s the other instructional designer or me, and they’ve got a simple computer question. Now we’re not the computer person. We have advanced degrees.”* (Educational Technology Post #6)

A number of respondents specifically pointed to the lack of respect for production oriented course work. Only two respondents were currently in production oriented roles, however a number of other educational technology and educational development respondents indicated they had been in production oriented roles in the past. The two



respondents in production oriented roles did not feel valued or appreciated by the faculty they worked with. Senior respondents elaborated that this type of work was often seen as being driven by senior administrators who wanted to acquire funding for online course development and that it was often pursued without general faculty support.

*“Heck, we’re not seen as peers, no, we’re not seen that way...they just work with us to get the extra contract pay or because they have been told they have to.” (Educational Technology Post #7 – production oriented role)*

Next, the key findings associated with the third and final research question are presented.

## ***4.5 How Teaching and Learning Professionals Generate Power and Influence***

A summary of the key findings in relation to how teaching and learning professionals generate power and influence suggest that social evaluations by other institutional members are linked to their ability to influence. Also, while teaching and learning professionals were using a variety of power bases and influence tactics to generate change at the individual, group, organisation and system levels their influence attempts were using primarily *soft* power bases rather than *harsh* power bases (Kipnis, 1984).

**Table 7: Power and Influence Findings Themes**

<b>Power and Influence Findings:</b>
<ul style="list-style-type: none"> <li>• Role status</li> <li>• Reputation</li> <li>• Influencing individuals</li> <li>• Influencing groups</li> <li>• Influencing the institution</li> <li>• Influencing beyond the institution</li> </ul>

### ***4.5.1 Foundations for Influence***

Respondents were asked to describe and provide examples of what bases of power (French and Raven, 1959, Raven, 2008, Raven, 1992) and influence tactics (Kipnis et al., 1980, Yukl and Tracey, 1992, Falbe and Yukl, 1992) they used when they want to or needed to influence others. Respondents described using a wide range of primarily *soft* (i.e. subtle and positive) power bases (Kipnis, 1984) related to the level of the influence

target. Although initially reluctant, when probed respondents also described a few situations where they had used *harsh* power bases (e.g. more overt reward and punishment). Nevertheless, their narratives continuously turned to the importance of role status and reputation as foundations or precursors for influence.

#### **4.5.1.1 Role Status**

As discussed earlier, a significant challenge respondents described was that many members of their institutions did not understand what they do. They described spending a significant amount of time and energy communicating and clarifying their role and the role of their centre. Lack of visibility and lack of role understanding by others created challenges for respondents.

*“The biggest barrier to our centre and to me doing what I need to do for our centre achieving what we want to achieve is very much a lack of true understanding of what it is that we can provide and do for people.” (Educational Development Post #2)*

Many respondents commented that visible executive leadership support of their mandate enhanced the status and visibility of their group which assisted them to accomplish their work. Some respondents described this visible support as articulated teaching and learning goals in the Academic Plan (a strategic planning document). Other respondents described how frequently executive leadership spoke about and in what way they spoke about teaching and learning priorities as an indication of visible support for their mandate. On the flip side, respondents indicated that the lack of senior leadership support created a significant barrier to their success. Respondents described that this was linked to both the power and influence executive leadership support could generate and to the control and influence those offices have over funding.

*“...we just finished a project on developing institutional learning outcomes and then making up the first ones in the province about twenty minutes ahead of the ministry ... telling us we had to do it... that really has helped to raise the understanding among even those folks who have been sceptical. They could see that the Provo [Senior Academic Officer] valued that. Research oriented faculty, like teaching oriented faculty are both political animals. They pay attention to what the senior person pays attention to.” (Senior Teaching and Learning Post #3)*

Support from a senior level champion, specifically the Provost/Vice-President Academic, is seen by respondents as very impactful on role status and how teaching and learning work is perceived by others in an institution. This impact is demonstrated by the contrasted experiences of these two respondents, both from teaching focused institutions.

*“My Vice President Academic would say, you should be the centre of the university. We should all be looking to you for support and ideas and suggestions. The teaching and learning centre is the centre.” (Senior Teaching and Learning Post #1)*

*“For a long time the director of our unit was sort of out of the loop. I have no input as to why. I have no understanding of it at all. But we hope that maybe with the new director, things will change. So I don’t know that it’s necessarily anything to do with the personalities involved or just how it works here. I just don’t know. But I do know, if you don’t have support of senior admin, boy you’re not going to get many initiatives off the ground.” (Educational Technologist Post #8)*

A few respondents articulated an important link between executive support and the ability to acquire funding. Respondents indicated they were more vulnerable to funding cuts than many other departments in the University. Senior respondents indicated that much of the funding for the positions and the work in their centres was not designated as “core funding”. This funding structure was described as an issue which made acquiring their annual funding more political than many other departments in the institution.

*“Academic development as a profession, it’s much more nebulous than teaching per se...not only because they are newer roles, but because of the nature of how these positions are constituted, the funding is always going... the funding is a big issue and which I am not alone in saying it...people go from job to job depending on how the funding situations vary.” (Educational Technology Post #5)*

Many respondents described that the link to senior leadership support and the funding vulnerability made many of their departmental initiatives appear as though they “may just be the flavour of the month” (Educational Development Post #3). Moreover, respondents described these issues made them and their departmental colleagues feel very apprehensive about changes in senior administration.

*“The director of a teaching and learning centre, is entirely vulnerable... their direction and their mandate, everything, can be completely undermined by a change in senior management.” (Senior Teaching and Learning Post #5)*

Seats on governance committees or involvement with policy were also linked to perceived role status. Those senior respondents who described feeling more stable and secure in their mandate spoke extensively about the various conduits for their voice to be heard within the institution. The two conduits that were described as helping them generate power and influence were team meetings and governance committee membership.

While a variety of regular team meetings were discussed as important venues for their voice to be heard, senior respondents specifically pointed to the importance of a standing seat at the senior academic officers’ team meetings. These were described as the Provost’s Council or the All Deans Meeting.

The importance of active involvement with designing and editing policy was also described as important. Secure senior respondents also described themselves as influential within numerous governance committees and as actively involved with writing policy associated with teaching and learning. Further, two of these senior respondents described that they had been instrumental in chartering new teaching and learning related governance committees.

*“I have much more power to make a difference in the director’s job by virtue of having access to information at the executive level so by being able to see opportunities for moving forward because I have more information. More access... access to people who can make the difference as well. I have direct access now to a president and all the vice presidents. I didn’t really have that before. And I’m finding that in conversations that evolve they’re beginning to... they’re beginning to use ideas that have come out of conversations that I have been involved in.” (Senior Teaching and Learning Post #7)*

Many respondents also commented that the increased focus on teaching and learning in the higher education field has brought their work out of the shadows and in turn increased the profile and status of their group within their universities.

*“Definitely in terms of the institutional framework over the 10 years that I’ve been here, there has been an enormous jump in our power and influence as a centre...because*

*of the centrality and the growth of the centre. We used to be in a little house on campus and in a sort of safe but marginal position allowed us to kind of explore things as we wanted and you know nobody was really paying attention institutionally. So it was kind of fun and we kind of did what we wanted. And now it's more of... we're much more brought in line with strategic focus and vision and planning, which of course raises our profile substantially.” (Educational Development Post #7)*

#### **4.5.1.2 Reputation**

Respondents were highly aware of how reputation plays a significant part in their ability to generate power and influence. Overall, the view of respondents was that their personal reputation, the reputation of their centre leader and the general reputation of their department were important foundations in their ability to generate power and influence.

*“The fact that people, including our provost and president, see me and see our centre as a source of expert knowledge is absolutely key to our success in what we do...our academic units seeing us as a source of expert knowledge is also critical to us being able to do what we do.” (Educational Development Post #2)*

Respondents commented that if the centre leader has a bad reputation, described as being, “not respected” or “difficult to work with” that the whole centre suffered in terms of reduced invitations and access to individuals, groups and committees.

*“...the previous director was going through a period of time where we weren't getting asked to be on things and she was going forward and saying, we really need to be on that committee, we really need to be on this committee. And now I'm getting the feeling that people were doing sort of a backend around her... a run around her because of the things that were going on. But since she left I find that I don't have that problem. I'm on way too many committees now. That's my problem now.” (Educational Development Post #1)*

While expert knowledge was described by respondents as the most critical and commonly used bases of power, a personal reputation of being “good to work with”, “helpful” and “trustworthy” were described as important precursors. Moreover, respondents who had been working for their institution for some time believed they had a distinct advantage because they were a “known commodity”, with established relationships and, assumedly, a positive reputation.

*“Building a reputation has been huge. We get so much word of mouth traffic from consultations or from departments so our reputation and credibility is a lot higher now than it was when I started here. I definitely think that’s a shift. I’ve been here so long that people either already know me or they know me by association through someone else. Somebody came here and had this great experience.” (Educational Development Post #1)*

Respondents indicated that much of their reputation and subsequent power and influence came from building and maintaining relationships, however maintaining relationships across all the different stakeholders in a university was described as time consuming and challenging.

*“Communication continues to be a constant challenge...managing all of the relationships. Sometimes I think of it as too many pies and not enough fingers...and it is a big challenge continuing to make sure that relationships are nurtured. People don’t like to be forgotten or ignored.” (Senior Teaching and Learning Post #4)*

Both role status and reputation were described by respondents as important foundations and closely linked to their ability to generate power and influence.

Respondents also described using a variety of power and influence tactics depending on the target of their influence attempt.

#### ***4.5.2 Influencing Individuals***

Most of the influence tactics described by respondents were targeted at influencing individual faculty members. Respondents most often described referent power and expert power as their primary bases of power. However, when probed, respondents also provided numerous examples of influence tactics that leveraged reward and coercive power bases. Respondents emphasised that they approached using power and influence differently when first establishing relationships versus once the relationship was established. Respondents commented that first they needed to build trust, respect and perceived value to effectively influence.

##### ***4.5.2.1 Establishing the Relationship***

When working with individual faculty members, a key strategy described by respondents was to first focus on what the faculty member perceived as problems, even if this was not what the teaching and learning professional believed were the primary

issues. Respondents indicated that by respecting the faculty members' priorities and helping them resolve issues they cared most about they got those "quick wins" that built trust, respect and perceived value.

*"So I'm a professor and I'm having difficulty with my group activities. My teams aren't functioning well. I may ask what kind of rubrics and things can I deploy to help my teams function better. After talking to them a bit, I might not think rubrics are the big issue, but that's what I'll focus on first...we [the teaching and learning team] have a wealth of expertise about team contracts, team learning, team rubrics that we can just put our fingers on and talk them through which ones are more appropriate instead of making them go search for themselves...I need to show them my value." (Educational Development Post #9)*

Respondents further described using a number of communication skills such as: listening, acknowledging, reframing and questioning techniques that ensured the teaching and learning professional had a clear understanding of the faculty members' perspective. Respondents indicated that this behaviour helped the faculty member feel heard and allowed the teaching and learning professional to gently guide the conversation to the issues at hand without having to overtly direct the conversation.

*"...it is about helping bring faculty on board in a way that doesn't threaten their traditional perceptions of themselves..." (Senior Teaching and Learning Post #7)*

A less direct approach, especially during the initial phases of a relationship was described as important by respondents. This related to a number of respondent comments regarding how their attitude towards faculty impacted how they went about their work. Respondents described that they recognised how much pressure faculty were under to meet increasing demands and how vulnerable some faculty members may feel about their teaching practice. They further commented that praise and enthusiasm balanced with a clear and repeated acknowledgement that the faculty member owns the decisions associated with their teaching practice and that they are the content experts helped them build openness and trust more quickly.

*"I recognize how scary it is for faculty... particular in a research-intensive university like ours where teaching is not necessarily what they've been hired on... it's a very public thing, but it's not necessarily what they are promoted on...when I first started working at the university, I always thought, professors are kind of like demigods right? ... you know they*

*might be just so insanely smart. But the more I got to know professors, I realised that in some ways they're very vulnerable and they're very... some of them... not all of them, but some of them can be feeling very insecure and so I learned how much many of them appreciate being praised because they're coming from... many times, they're coming from a very competitive environment where they don't get that. And they don't have a peer or anybody saying, you know that's a really great job. It's a little bit more cutthroat. It's not cupcakes and rainbows.” (Educational Technology Post #2)*

Respondents also commented that teaching experience (especially academic credit teaching) helped give them initial credibility when working with faculty. Twenty four of 28 respondents indicated they had taught academic credit courses and over half the respondents were still regularly teaching for an academic department. All of the respondents, except one junior educational technology respondent, indicated that teaching credit courses was either encouraged or expected. All of the respondents had taught professional development (non-credit) courses.

*“...teaching seems to be one of the sources of my legitimacy and credibility...experience in the classroom, has been, I think, the single biggest factor in having that credibility where people see me as a peer rather than as an administrator or something. So when I walk into a room we talk about students and assignments and grading and all that...” (Educational Development Post #10)*

#### **4.5.2.2 Selling the Vision and Closing with Data (Referent and Expert Power)**

When attempting to influence faculty to change, respondents most commonly described using referent power and expert power together in influence attempts. They commented that they used their communication skills, enthusiasm and in some cases sales skills to build interest, frame the reasons why the change would be worth considering, and to help targets of the influence attempt visualise what the change may look like in practical terms. However, respondents also emphasised the importance of evidence based information to support the reasons why or how the change would be executed.

*“Evidence talks in academia. If we want to be seen as having value, we have to provide expert advice, evidence based advice. They need know I'm not just throwing about a bunch of ideas based on my experience alone.” (Senior Teaching and Learning Post #3)*



Respondents described a number of influence tactics they used to frame the reasons for change. These included linking the change to their departments' goals and directives from senior leadership. However respondents most often described the use of a literature/evidence based argument linked to student learning as being a successful approach.

*"I focus on the common interest they have in their students and their students being successful. We want our students to leave here telling the very best stories about this place, about their experience, about what they learned, about how hard they worked, about what they experienced here. And you don't get much pushback from that. I mean you can kind of take people to that... that noble purpose." (Educational Development Post #6)*

#### **4.5.2.3 Carrots and Sticks (Reward and Coercive Power)**

When asked about reward and coercive power most respondents initially stated they did not have any reward or coercive power. Upon further probing respondents described a number of forms of recognition (*soft* rewards), access to people resources and access to grant/funding (*harsh* rewards) they used to generate influence. They also described their ability to remove resources as a coercive tactic that they had used to influence.

Respondents described being very liberal with complements and praise when attempting to influence others. Respondents described recognising work that was well done, complementing ideas, and acknowledging the effort made towards change as essential tactics to motivate and to further build relationships with the targets of their influence attempts. Respondents described that if the faculty member enjoyed working with them and felt good about the work they were doing that they were more likely to continue. Moreover, they would be more likely to speak to others positively about them and the teaching and learning centre.

Public recognition was also described by respondents as a regularly given reward. For example, two respondents described that when they were in a meeting or facilitating a workshop they would look for opportunities to recognise someone's skill or expertise in a particular area in front of others.

*"If I can make them look good, I do. Then they want to work with us, want to be part of what we're trying to accomplish." (Educational Technology Post #3)*

Respondents also provided examples of how they used a less direct reward power, a letter of thanks, to influence faculty members to help coordinate or facilitate teaching and learning activities. As noted earlier, teaching and learning professionals were mindful about separating themselves from the evaluative judgement of faculty teaching for performance management or promotion type purposes and any respondents who mentioned it stated they do not write letters of recommendations for faculty regarding their teaching. However, respondents indicated they would provide a thank you letter for faculty who had worked with them on projects or had facilitated teaching and learning workshops. Respondents commented that these thank you letters were seen by faculty as a reward as they could then include the thank you letter in their teaching dossiers.

The ability to provide resources, either people or money, is a very tangible form of reward or *harsh* power base (Kipnis, 1984) that can generate influence. A few respondents stated that their centres now had research funding and/or grants that they either allocated or were involved in allocating. Two senior respondents also commented on their ability to provide people resources gave them reward power and enabled them to generate influence.

*“...I have the ability to say, wow, this is really interesting. I’m going to assign one of my instructional designers to work with you so you can actually further this.” (Educational Development Post #2)*

On the other hand, respondents described their ability to remove themselves or other resources as their only example of a coercive power base for generating influence. Respondents indicated that they saw this power base as a last resort and that it was used sparingly and with caution.

*“If I really feel they aren’t making an effort or if I have other pressing commitments, I’ll talk to them about deadlines and let them know what I can and can’t do for them...” (Educational Development Post #8)*

#### **4.5.3 Influencing Groups**

Some respondents provided examples of how they generated influence towards change at a departmental or group level.

Perhaps obviously, respondents commented that they were best able to influence groups if they were “*at the table*” when groups were gathered. Some respondents

commented that they were regularly invited to participate in a variety of meetings, such as an academic department meeting, Dean's meetings with their Department Chairs/Heads or an ICT Department meeting. While other respondents complained that they "should be" or "needed to be" involved but were not invited. Those respondents that were regularly invited stated that they were invited because of their reputation and relationships with the meeting leaders.

*"I've worked with a fair number of departments now, the word has gotten out I think, that I'm an alright person to work with...word is out that I can be helpful and that I can facilitate things. I can help things along and speed things up." (Educational Development Post #7)*

Respondents with role responsibilities for curriculum development and renewal described how their role as a facilitator and consultant associated with curriculum provided them the opportunity to use their communication skills to clarify the interests and opinions of group members and, when they deemed appropriate, to gently steer some of the thinking and decision making. When attempting to steer and influence in a group situation respondents provided a number of examples of using rational persuasion, inspirational appeals and legitimating tactics (Seifert et al., 2003, Yukl and Tracey, 1992). They described citing the literature; referring to departmental or institutional goals and deferring to the initiative sponsor (most typically the department chair) as commonly used influence tactics.

Many respondents also described coalition tactics (Seifert et al., 2003, Yukl and Tracey, 1992) such as identifying key members of the group and attempting to influence them and build support or alter their perceptions prior to a group meeting. One respondent commented that this was more effectively done if they carefully observe people and analyse a situation with regards to what is important to each individual.

*"...being very open to observing and studying the environment almost like an anthropologist and figuring out, okay, where is the cheese for people. If I need their cooperation and I don't have the authority to just dictate to them, which is true even of your own staff most the time. How do I organise and plan in a way that will motivate people to implement the plan and get it done ... and accept the fact that they're not all going to like each other and it isn't a perfect world and that perhaps it won't go just the way I would have done it if I did it myself." (Educational Technology Post #10)*

Another respondent when describing how they build consensus to influence groups stated it is *“about understanding their hot buttons”* and framing your influence attempt in terms of their priorities.

*“Some colleges felt that student retention was their highest priority and this initiative improved retention. Others felt that student-faculty engagement was the highest priority and this initiative addressed that too, and so on. So, basically, we need to be able to speak to each of our various partners with language they need to hear...it builds stronger connections and garners support.”* (Senior Teaching and Learning Post #4)

Respondents also described leveraging other people’s knowledge or position power to influence groups. For example, one respondent described that it was much easier to influence if you had a clear understanding of the background and history first.

*“I will often go to someone who is in a position of power over the people who need to be influenced. So I might go to a Dean or a Vice President or even a President to explain the situation, to get their support and to ensure that I’m on the right track...there may be strategic reasons or historical reasons or I don’t know, other kinds of reasons that explain things...sometimes there is history behind our practices or our attitudes that needs to be addressed before influence can happen.”* (Senior Teaching and Learning Post #7)

A few respondents from all three groups also described confidential consultancy to team leaders, such as Deans, Associate Deans and Department Chairs/Heads, as a way they indirectly influenced groups. Finally, five respondents shared with a laugh that they managed to influence groups to attend their own meetings with a reward of food: cookies, muffins, snacks, etc. One respondent described with pride that she is, *“a great baker and everyone knows it!”* Another respondent stated, *“I know it sounds crazy but academics will do a lot of things for a chance to sit around and eat cookies”*.

#### ***4.5.4 Influencing the Institution***

As discussed earlier, respondents described their role on governance committees and structures as linked to perceived role status. They also described their seat on governance committees as their primary venue to influence organisational level change at their universities. As stated by one senior respondent, *“I sit at a lot of tables and I didn’t ten years ago.”* They further elaborated that committee work is political work. Respondents described commonly using coalition tactics (Seifert et al., 2003, Yukl and

Tracey, 1992) when attempting to influence at an institutional level. Respondents commented that they are most influential in committees when they have conversations with and attempt to establish alignment with other committee members in advance of committee meetings. Respondents also commented that encouraging and championing the creation of standards and policies associated with teaching and learning was an important way they influenced at an organisational level.

*“...indirectly, I use the Teaching and Learning and Evaluation Committee as my club [laughs], because they’re my conduit to Senate. And through them, I mean I bring things to that committee... for example, we’re looking at creating a policy... actually I’m working on a policy right now for teaching space. Which would mean that when they’re refurbishing, or when they’re building new teaching spaces, that these guidelines have to be followed. Now it’s going to be really difficult to get that through Senate and when you get it through Senate, it’s going to be really difficult to get facilities management to follow it. However, if it’s sanctioned by Senate, it has to be followed.” (Senior Teaching and Learning Post #5)*

#### ***4.5.5 Influencing Beyond the Institution***

As noted earlier, almost all respondents were members of and attended meetings and conferences of professional associations dedicated to teaching and learning. Over half the senior respondents were actively involved in leadership roles in one or more of these associations. Respondents described that they were able to influence others in the field through these channels.

Conducting and disseminating teaching and learning centred research, in both Canadian and in international publications was another channel respondents used to influence the broader system. Moreover a few senior respondents indicated they have been invited on and participated in provincial government committees regarding the quality of education.

#### ***4.6 Concluding Remarks on the Findings***

This section will summarise the findings associated with each research question and position the findings in relation to additional relevant literature.

#### ***4.6.1 How are the roles of teaching and learning professionals evolving?***

Respondents reported that a growing number of teaching and learning oriented roles at various levels have been created and/or consolidated into teaching and learning centres and that these centres structurally report up through the senior academic office. While some observers of teaching and learning work have described an increase in role scope and partnerships with other departments (Lee, 2010, Austin and Sorcinelli, 2013) these findings indicate that Canadian teaching and learning centres are not only working in partnership with the other teaching and learning oriented functions and departments, but they are consolidating (Schroeder and Associates, 2011) and growing into larger centralised centres. In parallel with this change, the general purpose of this work was described as shifting; from that of “*reactive remediation*” to that of “*ongoing enhancement*”. Respondents described that much of the recent growth and institutional focus on teaching and learning roles was associated with government steering, specifically in the areas of curriculum development and online/distributed learning. However, respondents further commented that the credibility individual teaching and learning professionals have earned over time has also played a significant part in the consolidation and growth of centres.

The role duties of many respondents were described as shifting, especially in larger centres. This included an expansion of scope for technology focused posts, represented by a shift from “*production oriented*” course creation to “*development oriented*” technology integration. Other roles narrowed and became more specialised in nature, such as roles dedicated to curriculum development. An increased responsibility for research was also reported as a change in duties for many respondents and a trend of increasing academic credential requirements to acquire teaching and learning posts was reported at all levels. Finally, a number of challenges and tensions were discussed, related to inconsistent role classifications and inconsistent pay scales.

#### ***4.6.2 How are the identities of teaching and learning professionals evolving?***

Four overarching themes, associated with how the identity of teaching and learning professionals are evolving, emerged: (1) the shared values of supporting, helping, or service, (2) the emerging bridging and translator identity, (3) the importance and continual effort placed on developing respect and credibility for themselves and their

department, and (4) the strong identification with an external network of professional colleagues *via* professional associations. A few additional themes associated with specific respondent groups were also identified: (1) a link between identity and primary role tasks was identified, and (2) based on hierarchical level, a variation in orientation to their change role was noted, and (3) there were tensions associated with lack of visibility and other institutional members not understanding their roles - these tensions were particularly acute in the educational technology role.

These findings challenge the view that teaching and learning professionals do not have a shared identity (Handal, 2008, Land, 2008). Handal (2008) proposed that academic developers (teaching and learning professionals) do not have a shared identity as they “work in different organizational settings, with different mandates, with very varied career backgrounds and with a relatively weak professional organizational support”(p. 67). These findings, however, indicate a shared sense of identity is emerging, at least within the Canadian higher education system. A shared purpose underpinned by a shared set of values and supported by strong professional association identification appears to be enabling the creation of an emerging identity linked to bridging and translating between various stakeholders needs. However, as explored by Land (2004, 2008) how teaching and learning professionals orientate themselves and take action varies. The findings in this study indicate this orientation is related to a range of contextual variables, such as the individual’s hierarchical placement, the institutional type and how embedded and credible the work of teaching and learning professionals is perceived to be at a specific institution.

These findings support Borden’s (2008) contention that in higher education professional associations play a significant role in the formation of professional identity. Further, as evidenced by the tensions associated with faculty or non-faculty classification, these findings also support Borden’s contention that as the work or duties of *blended professionals* such as teaching and learning professionals overlap more closely with either traditional academic work or traditional administration work that these overlapping identities blend and become more problematic (Borden, 2008).

#### ***4.6.3 How do teaching and learning professionals generate power and influence?***

Respondents indicated perceived role status and reputation are important foundations to enable influence. Whilst teaching and learning professionals were using a

variety of power bases and influence tactics to generate change at the individual, group, organisation and system levels their influence attempts primarily leveraged *soft* power bases rather than *harsh* bases (Kipnis, 1984).

Most of respondents' narrative focused on influence tactics to persuade individual faculty members. They emphasised the importance of first establishing a relationship of trust, respect and perceived value before attempting to more directly steer or influence change. Respondents did comment that they are in a position to influence more broadly than they had in the past. They described situations where they were able to influence at the group, organisational or system level. In many cases the ability for teaching and learning professionals to influence at these levels was linked to the relationships they had built over time and to their job roles: such as a curriculum development role, a seat on a governance committee, or an executive role within a professional association.

In summary, it was argued in the literature review that the literature supported a link between roles, identity and power that, in turn, made it logical to consider all three variables in a quest to explore how teaching and learning work was evolving. Upon reflection and analysis, this interconnectivity between role, identity and power was evidenced in the findings. It appears that in this study the linkage between role, identity and power were expressed through respondents' efforts to build credibility, status and reputation. Further, the findings indicate that the ability for teaching and learning professionals and teaching and learning centres to carve out and legitimise an organisational space for their work is tied very closely to these social evaluations and, with them demonstrating that they have a distinct value and a distinct purpose. The overarching pattern suggested by the findings is that in some institutions, a larger more focused space between the traditional boundaries of faculty and administrative domains is being established for teaching and learning professional work. Moreover, this space is being framed by a third voice, that of the student.

These observations regarding the interconnectivity between role, identity and power, reflections on how an organisational space for teaching and learning work may be legitimised, and their implications will be further explored and discussed in the next chapter.



## ***Chapter 5 – Discussion and Implications for Practice***

### ***5.1 Introduction***

As detailed in the literature review, an underpinning assumption of this study was that teaching and learning professionals occupy a change oriented role that requires influence to accomplish their work tasks. Moreover, it was argued that the literature supported a link between roles, identity and power that, in turn, made it logical to consider all three variables in a quest to explore how teaching and learning work was evolving. Upon reflection and analysis, this interconnectivity between role, identity and power use was evidenced in the findings.

It appears, that in this study, the linkage between role, identity and power were expressed through the processes of building credibility, status and reputation in an effort to acquire the legitimacy needed to influence and accomplish their goals. It was also observed that the student agenda has entered respondents' discourse as a third voice impacting how respondents viewed their work and their associated organisational work boundaries. This chapter attempts to further unpack these observations and offer a number of implications for practice stemming from these findings.

First the evidence and implications of interconnectivity between roles, identity and power are discussed. Next, a proposed process of how an organisational space for teaching and learning work may be legitimised and a visualised "*middle space*" for teaching and learning work, residing between the agendas of faculty, administration and students are explored. Then, a summary of the contributions to the literature made by this study is provided. Finally, a number of implications for practice are discussed and some concluding discussion regarding the chapter is offered.

### ***5.2 Interconnectivity of Roles, Identity and Power***

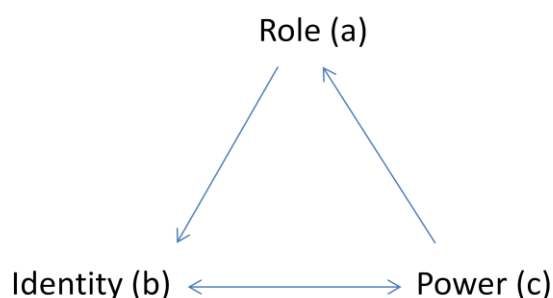
Research suggests that we define much of who we are by what we do, and that our sense of self affects the way we do our work (Ibarra, 1999). In support of this view, it was argued in the literature review that to understand influence attempts and perceived power bases the link to roles and identity must be considered. The findings in this study support previous research that indicates there is a relationship between roles (structure) and identity (Alvesson and Willmott, 2002, Dutton et al., 1994, Ibarra, 1999, Sluss and Ashforth, 2007) and provide evidence to support the theorised link between identity and

action (Alvesson et al., 2008, Ibarra, 1999). Most importantly, it is argued, the interconnectivity of role, identity and power, was expressed through respondents' attempts to make sense of and in many cases change the social evaluations of them, their team and their work in an effort to legitimise a unique organisational space and enable them to accomplish their change oriented goals.

In the literature review, the envisioned interconnectivity was described as a continuous cycle of role variables contributing to identity formation which in turn, both consciously and subconsciously, inform attempts to influence and action. It was argued that how the teaching and learning professional perceived their interactions with others and the outcomes resulting from those attempts to influence further informed and possibly modified their evolving role. This was proposed as an ongoing cycle with sense making and social interaction playing a large part in how they perceived their roles, identities' and power bases. Upon analysis and reflection the findings support the intertwined nature of role, identity and power. However, how the relationship was theorised from the literature versus how the relationship between the constructs evidenced itself in the findings was slightly different. The narratives of respondents indicate that both identity and role are potentially impacted following an attempt to influence.

The figure below is used to reference examples of how this interconnectivity was evidenced in the findings.

**Figure 5: Interconnectivity between Role, Identity and Power**



### ***(a) Role Informing Identity***

Research indicates identity evolution is subject to many influences, including organisational roles and the associated structures, occupational demands of interacting with others as well as individual motivations for change (Alvesson and Willmott, 2002,

Dutton et al., 1994, Ibarra, 1999, Sluss and Ashforth, 2007). Moreover, occupation is known to be a key identity resource (Alvesson et al., 2008). The findings in this study support these views and indicate that the role structure and tasks of teaching and learning roles impact, at least in part, teaching and learning professional identity formation and were perceived by respondents to be linked to their desire for themselves personally and their centre to acquire status and credibility.

As described in the findings, respondents' description of their professional self was clearly related to the role tasks or duties they spend the majority of their time on. For example, respondents who described their main tasks as working with faculty on their teaching and learning strategies were more likely to describe themselves as an *"academic"* or an *"educator"* and respondents who described their main tasks as working with faculty and departments on curriculum development and renewal tended to describe themselves as a *"professional service"*, a *"consultant"*, or a *"facilitator"*.

Moreover, a link between professional identity and structure was observed as respondents described that they felt it was important for their work to be positioned on the academic side of the institution, but yet separate from any one school or department. One respondent further elaborated that, *"it acknowledges teaching is a scholarly enterprise, not just a logistical one...it is complicated and it involves critical reflection like all academia does."* The identification with academic work and perceived higher role status associated with academic work is noticeable.

Links between structure and identity was also identified in the narratives of respondents when they described their physical space in the library. This structural element of their role was described as impacting their status, further reinforcing their academic identity but sending messages regarding their neutrality and transparency. Moreover, respondents described that teaching was their greatest source of credibility with faculty and that conducting research, particularly in partnership with faculty increased their personal credibility and the legitimacy of their work in the eyes of others. Finally, larger more centralised groups with higher levels of posts being added to their institutional structures were described as building their credibility.

Not only was the link between role and identity formation supported by the findings. The findings also demonstrated that role perception and identity informed respondents perceived power bases and influence attempts.

### ***(b) Roles and Identity Informing Perceived Power Bases and Attempts to Influence***

Existing researchers have theorised linkages between structure and action (Alvesson et al., 2008, Ibarra, 1999). In support of and extension of those observations, these findings indicate that *via* sense making, respondents' role perception and identity formation regarding social evaluations of them and their work impacted what power bases they perceived they had available to them and, in turn, impacted their attempts to influence.

For example, the shared values of "*caring*" and "*helping*", the purpose of "*ongoing enhancement*" and the bridging and translating identity described in the findings appear to have informed and impacted respondents' influence attempts and power use. This was evidenced by respondent focus on first developing a relationship and comments regarding how their attitude towards faculty impacted how they went about their work. Teaching and learning professionals chose to "*build up*" the faculty member and "*bring them on board in a way that doesn't threaten their identity*" in order to build trust. They also described using *soft* tactics to influence and altering their communication style and language to reflect the norms of the discipline or school the influence target was part of.

In another example, respondents described tensions between their shared sense of values, that of helping and caring, and the actions of evaluating or judging faculty work for appraisal purposes. It is suggested that this dissonance is linked back to how teaching and learning professionals see themselves and how they want others to see them in their role. Individuals want to behave consistently with their attitudes and values (Ajzen and Fishbein, 2000, Fabrigar et al., 2006) and consistency is expected to impact the attributions of others (Kelley, 1967, Kelley and Michela, 1980). In the situations described by respondents, the values of helping and caring and the purpose of enhancement and development appear to be at odds with the actions of monitoring and judging.

These examples illustrate how roles and identity informed influence attempts and action. The findings also evidenced that social interactions involving power use informed the teaching and learning professionals' role perception and identity formation.

### ***(c) Power Use Informing Role and Identity***

Following an influence attempt, social cues and sense making inform role perception and ongoing identity formation. Theoretically, following a successful influence attempt, a teaching and learning professional may attribute their success to the belief they communicated clearly and had good evidence for their suggestions which translated into being seen by the target of their influence attempt as a knowledgeable and collaborative partner. This sense making is expected to impact their role perception and how they see themselves (their identity). Over time, through their own agency or through the actions of other social actors, these evolving perceptions may also influence their role structure.

Similar sense making was evidenced in the findings. For example, respondents described the importance of building a relationship of trust, relevance and perceived value, with the targets of their influence attempts. They further described that once this initial relationship was built that they were able to successfully modify their influence approach and more proactively make suggestions versus reactively respond to requests. It is suggested that it is the sense making of the teaching and learning professional that enabled them to identify a shift in the perceptions and social evaluations of the influence target that resulted in a shift in the relationship. It appears their sense making impacted their identity in terms of how they saw their role and themselves in relation to the influence target and, what influence tactics they believed were most likely to be beneficial going forward. This resulted in them shifting their role task from that of responding to requests for help, to making suggestions on teaching practice areas that they perceived as important for ongoing enhancement.

In summary, the interconnectivity of role, identity and power use was evidenced as very relevant in this study. It is not to suggest that influence attempts are the only social influences on role perceptions and identity formation. Social influences can stem either from the larger structural context in which individuals are embedded or from their more immediate social environment (Salancik and Pfeffer, 1978). However, the narratives of respondents indicated they were attempting to create alignment and consistency between their role perception, identity and action and that these changed overtime. In an ongoing cycle of continuously renegotiating an internal view of their role and identity they were able to navigate the questions of “Who am I?” and “Who are they?” which informed “How should I act?” (Alvesson et al., 2008).

Logically, although not initially focused upon in this study design, the findings indicate that respondents are acutely aware that structure and social interaction informs the perceptions and social evaluations that other institutional actors attribute to them. In this study, much of the respondents' narratives associated with their roles, identity and attempts to influence were tied to how they were perceived by other organisational actors and the connected issues of building legitimacy. Through the analysis process the overarching theme of building legitimacy emerged from the data, linking together the intertwined finding themes of status, reputation and credibility. The following section expands on this observation and discusses the mechanisms which appear to impact the legitimisation process of teaching and learning professionals and educational development work.

### ***5.3 Mechanisms Impacting Legitimation***

This section focuses on the mechanisms identified in this study that appear to be linked to the legitimisation process. First the concepts of legitimacy and legitimation are discussed. Then the importance of the social evaluations of reputation, status and credibility are explored. Finally a theorised process of how teaching and learning work may be legitimated in a progressively larger organisational boundary is offered.

#### ***5.3.1 Legitimacy and Legitimation***

The modern approach to legitimacy research stems from the writing of Weber. Weber (1978) argues that social norms and values become part of people's internal motivational systems and guide their behaviour separately from the impact of incentives and sanctions. Currently, the most widely cited definition of legitimacy is Suchman's formulation. Suchman (1995) argues, legitimacy is a "generalised perception or assumption" that an entity's actions are "desirable, proper, or appropriate within some socially constructed system of norms, values, beliefs, and definitions" (p.574). Tyler (2006) proposes, "legitimacy is a psychological property of an authority, institutions or social arrangement that leads those connected to it to believe that it is appropriate, proper and just" (p.375). As discussed in the literature review, French and Raven (1959) refer to legitimacy as social influence induced by feelings of "should," "ought to," and "has a right to", or for example by appeals to an "internalised norm or value." Like all social constructions, legitimacy is a property of the relation between a subject and its relevant stakeholders. To characterise legitimacy as either belonging to a subject or being granted by a stakeholder oversimplifies this relation. It is suggested that legitimacy is

more usefully construed as a continual negotiation. Walker and Zelditch (1993), drawing on the work of earlier researchers, identify legitimacy as the “process by which the legitimacy of a subject changes over time”.

Deephouse and Suchman (2008) identify that “subjects of legitimacy are those social entities, structures, and actions, and ideas whose acceptability is being assessed.” Zelditch (2001) points out that the range of what might potentially be legitimated is broad, and includes authorities, institutions, policies, status hierarchies and inequalities of wealth or status. “Legitimacy is also an issue on the group, organisational or system level”, where the legitimacy of groups “is part of the overall climate or culture” (Tyler, 2006). Maurer (1971) asserts that “legitimation is the process whereby an organisation justifies to a peer or superordinate system its right to exist” (p.361). Institutional theories have also emphasised that many dynamics in the organisational environment stem not from technological or material priorities, but rather from cultural norms, symbols, beliefs and rituals (DiMaggio and Powell, 1991). These observations reflect the idea that legitimacy is socially constructed and emerges out of the subjects’ affiliation to other rules, laws, norms, values, and cognitive frameworks in a larger social system (Deephouse and Suchman, 2008). While much of the current legitimacy literature focuses on the relationships between organisations and their broader systems, the possible subjects of legitimation are almost endless. In this study, legitimacy or justification to faculty and other institutional colleagues of “their right to exist”, interpreted as their right to be involved in the teaching practice of academics and broader teaching related practices and decisions in their institution, is certainly an issue of interest for teaching and learning professionals and for those who wish to enable teaching and learning professionals in accomplishing their change oriented goals.

The concept of legitimacy has been made by researchers into an anchor-point of an expanded set of theoretical tools addressing the normative and cognitive forces that constrain, construct and empower organisational actors (Suchman, 1995). For example, as predicted by legitimacy theory, studies within work-based organisational settings show that employees are more willing to follow organisational rules and authorities when they believe that they are legitimate (Tyler and Blader, 2005). Similarly, it seems to reason that targets of influence would be more likely to listen to, consider and potentially comply with a change agents’ influence attempt if they believe that the agent is legitimate.

The findings in this study have pointed to the construct of legitimacy and the process of legitimation as anchors to reflect on the ways in which structural arrangements, social arrangements and associated organisational boundaries may potentially be modified. Researchers have observed that “the interrelationships among legitimacy, status and reputation offer numerous research opportunities” (Deephouse and Suchman, 2008, p.65) and that “at a theoretical level, much work remains to be done on how the processes of legitimation, reputation-building and status-seeking intersect and overlap (Rao, 1994). The findings in this study provide a contribution to these identified gaps. Specifically, the findings provide indications of how the social evaluations of status, reputation and credibility appear to act as mechanisms in the process of building legitimacy.

### ***5.3.2 Building Legitimacy through Social Evaluations***

As explored in the findings, respondents described the importance of role status and reputation as precursors or foundations which increased their potential power or ability to influence and much of the narratives of respondents focused on issues of credibility or an ongoing quest to acquire credibility. Stemming from the findings and consistent with personal experience, it is proposed that, in this context, the social evaluations of role status and reputation work in conjunction with the processes linked to establishing credibility and that they are key mechanisms in legitimation.

Status is “a socially constructed, inter-subjectively agreed upon and accepted ordering or ranking of social actors” (Washington and Zajac, 2005, p.284). This construct is further elaborated on by Benjamin and Podolny (1999) who clarify; status is based on the esteem or deference that each actor can claim by virtue of the actor’s membership in a group or groups with distinctive practices, values, traits, capacities or inherent worth. Reputation, on the other hand, is a generalised expectation about a future behaviour or performance based on collective perceptions, acquired either directly or, in many cases, vicariously, of past behaviour or performance (Rindova et al., 2005).

It is proposed that if the initial role status and reputation of a teaching and learning professional created by senior leadership and other key stakeholders, through reporting structures, desirable office space, access to financial and personnel resources, verbal support, etc. is positive, that it can generate enough social influence to temporarily open the doors and minds of other institutional colleagues. Of course, other information sources, such as academic publications, internal communication bulletins, government



communiqués, other colleague opinions, etc. may contribute to the initial status and reputation of the teaching and learning professional or teaching and learning centre. Nonetheless, the proposed idea is that status and reputation appear to be the mechanisms that create a space where a new voice, in this case a teaching and learning professional's voice, can be *heard* which, subsequently, gives them the opportunity to demonstrate their expert knowledge and earn trust which in essence is credibility.

Credibility is defined as, "the quality of being believed or accepted as true, real, or honest" (Merriam-Webster, 2013). Source credibility is normally identified to consist of expertise and trustworthiness (Pornpitakpan, 2004, p.244). Where expertise refers to the extent to which an individual is perceived to be capable of making correct assertions, and trustworthiness refers to the degree to which an audience perceives the assertions made by a communicator to be ones that the speaker considers valid (Hovland and Weiss, 1951). In other words, the individual is perceived to be credible if they know what they are talking about and the audience believes they are telling the truth as they see it. Certainly, in the case of teaching and learning professionals, the need to be perceived as a knowledgeable expert regarding educational development work and to be perceived as trustworthy was evidenced in the findings.

Moreover, it is theorised that, if, as social interactions take place, especially those involving influence or persuasion, credibility (expertise and trustworthiness) in relevant areas is perceived by the target of influence, that then, over time, relationships of trust and perceived value are built which results in increased reputation and status. Subsequently, social evaluations of increased reputation and status create additional opportunities to be *heard* and to demonstrate credibility and value at potentially broader levels of institutional impact.

For example, if a teaching and learning professional works with a few individual faculty members on their teaching practice and if those faculty members perceive the teaching and learning professional as knowledgeable, trustworthy and helpful (relevant) to them, credibility is expected to be earned with these individuals. This earned credibility then translates into how those faculty members speak about the individual teaching and learning professional. Compounded over time, these stories of personal experience, told to others is expected to impact the reputation and status of the teaching and learning professional, as perceptions are shaped by the opinions of salient or relevant others (Rice, 1993). This, presumably, increased reputation and status and increased visibility is

expected to result in further opportunities to earn credibility, such as invitations to departmental meetings or additional consultations with others who may not have previously considered *hearing* or seeking the opinion of a teaching and learning professional.

Seen as key mechanisms in the process of legitimisation, building credibility and the resulting increase in status and reputation, is expected to provide a foundation from which to access other, potentially higher visibility and broader impacting work. Teaching and learning professionals would have the opportunity to establish a broader legitimate work boundary through repetition of the same process at broader levels (within groups, organisation-wide, etc.). A space where they, and the work they are doing is perceived by other organisational stakeholders as being “desirable, proper, or appropriate” within the “socially constructed system of norms, values, beliefs, and definitions” (Suchman, 1995, p.574) of their institution.

This legitimisation process is visualised as a dynamic cone shaped spiral that has the potential to broaden overtime through (1) increasing awareness, status and reputation and through (2) ongoing interactions that evidence expertise and build trust. Moreover, if more institutional members build relationships of trust, respect and perceived value with teaching and learning professionals and if more structural role factors are aligned to enhance status the expected result would be a perpetuating cycle through which opportunities to build credibility in broader organisational spaces are presented. It’s further expected that the sense making of teaching and learning professionals themselves and the sense making of institutional members, as they encounter, acquire information and process their ongoing experiences, will evolve the organisational stories, perceptions, norms and values which has the potential to legitimise new organisational boundaries for educational development work.

This theorised process of how increasingly broader legitimated work boundaries may be built is not proposed as linear, especially in larger schools with multiple teaching and learning professional posts. There are too many variables impacting status and reputation at multiple levels and the loosely coupled nature of academic institutions (McNay, 1995) makes the probability of consistent assessment by relevant stakeholders and parallel infiltration into separate departments and work units unlikely. It is more likely that teaching and learning professionals experience, “inconsistent status” (Lanski, 1954)

amongst various stakeholder groups and amongst various organisational levels as they work through the legitimisation process in different spaces.

Multiples spaces are expected to be in different stages of the legitimisation process. For example, a teaching and learning director may be assigned as a representative on a broad reaching governance committee by a senior leader. While simultaneously, based on other successful experiences, a teaching and learning professional may have been invited by an academic department to lead their curriculum planning meetings for the third time and a seasoned faculty member who's never worked with a teaching and learning professional before may decide, based on speaking to one of their colleagues, to invite a teaching and learning professional to meet with them for the very first time. All of these situations signify varying stages of legitimisation, at various organisational levels with various stakeholder groups. Moreover, they are all opportunities to build credibility at different levels and, in turn, impact the legitimisation process.

Of course, not all influence attempts result in positive assessments by the influence target. The opportunity for influence attempts to result in negative assessments and to have negative impacts on status, reputation and credibility are potential outcomes as well. The expected result would be a reduction in reputation and status, a reduction in opportunities for influence and credibility building and over time potentially reduced legitimate work boundaries.

In summary, it's suggested that in this context credibility plays a significant part in legitimisation of educational development work. As a result, it is theorised that widely acknowledged credibility within an organisational boundary enables legitimacy in that space. The social processes associated with building credibility are visualised as interconnected with reputation and status. The credibility, reputation and status of educational development work in an institution have the potential to increase or decrease over time based on the perceptions and sense making of organisational members. As organisational members learn about, hear about and/or interact with teaching and learning professionals their perceptions and their social evaluations of both the individual teaching and learning professionals and of educational development work in general evolves. This generates new stories, norms and value judgements associated with educational development work. While not directly linear or sequential, built credibility is expected to increase reputation and status which, in turn, opens a space for broader levels of influence attempts and, if successful, a space for broader levels of credibility to

be established. In essence, credibility and legitimacy create the opportunity to build more credibility and legitimacy. However, building credibility and legitimacy in a new space is not easy. In general, the literature depicts the task of maintaining legitimacy as a far easier enterprise than either gaining or repairing legitimacy (Suchman, 1995).

The social evaluations of status, reputation and credibility are seen as important mechanisms in the legitimisation of educational development work. However an appreciation of where the organisational space for educational development work fits within the organisational landscape and the challenges of maintaining this distinct organisational space between the competing agendas of administration, faculty and students also emerged as a central theme from the narratives of respondents. The following section explores and discusses the implications of the organisational space described by respondents.

### ***5.3.3 Legitimising a Distinct Middle Space***

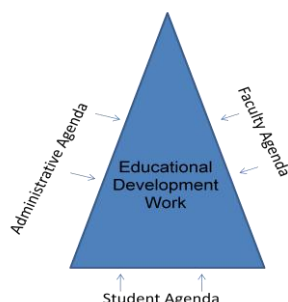
Whitchurch (2008d) identified an increase in the number of *blended* professionals within the *third space* (between academic and administrative domains). She further observed that these individuals are able to work across the *faculty –administration divide* using translational skills to achieve effective outcomes. While these translational skills were evidenced as extremely relevant, in the case of teaching and learning professionals it appears to be more than working across the divide that enables them to effectively influence change and achieve their goals; it is the creation of a *distinct middle space*.

As described earlier, role status is seen as a significant mechanism in creating legitimacy and status is related to the esteem or deference that each actor can claim by virtue of the actor's membership in a group or groups with ***distinctive*** practices, values, traits, capacities or inherent worth (Benjamin and Podolny, 1999). It is suggested that the creation and legitimisation of a distinct organisational space, in this case a *distinct middle space*, enables them to effectively influence change towards "*enhancement*" of "*good teaching and learning*".

The narratives of respondents indicate they are acutely aware that their work requires them to occupy a *distinct middle space* and that they see themselves as a bridge and translator between competing interest groups. Specifically respondents spoke about balancing and interpreting the needs of faculty, administration and students. Based on

the narratives of respondents, the evolving organisational space for educational development work is visualised as follows:

**Figure 6: Evolving Organisational Space for Educational Development Work**



The narratives of respondents further focused on the importance of not being biased towards any existing agenda, be that of administration, faculty or students. It is suggested that this need to be “*unbiased*” and “*separate from*” any of the competing agendas is a critical element for teaching and learning professionals to claim and legitimise a distinct organisational space.

To explain this suggestion it is useful to consider Bourdieu’s insights. In Bourdieu’s terminology we can consider the relationship between “fields of practice” as “a configuration of relations between positions objectively defined in their existence and in the determinations they impose upon the occupants, agents or institutions” (Bourdieu and Wacquant, 1992). The historical duality of *fields* in higher education, those of faculty and administration, permeates the literature and rhetoric of universities and positions faculty as the central or dominant *field*. The traditional primacy of the faculty field in Universities indicates that, in Bourdieu’s terminology, the field of educational development was historically *embedded* within the discourse of a traditional service relationship as part of the *other*, the administration (Whitchurch, 2008c).

Carving teaching and learning out of the existing rhetoric of the *other* and claiming a component of work that has traditionally been seen as within the faculty space is not straight forward. It requires changing the existing perceptions of dominant actors. However changing existing perceptions is not easy. Recent research demonstrates that a field of practice can be *trapped* (Sandholtz, 2012) by pre-existing perceptions and legitimacies. To further complicate this process, another, perhaps not new, agenda or

voice has gained prominence in the organisational space of higher education, that of the student (see e.g. Trowler and Trowler, 2010).

The narratives of respondents spoke clearly about the need to communicate their capability and value and to be perceived as distinctive from and not aligned with any of the existing agendas. As one respondent stated, we need to be *“a little Switzerland”*. It is suggested that consistency, in both the structure of their roles and their behaviour may reinforce the message that teaching and learning professionals have a distinct role. Consistency would help build new norms, values, beliefs, and definitions associated with their work which, in turn, would enable the creation of a separate and distinct organisational space. For example, respondents described the importance of separating themselves from evaluative tasks to avoid being perceived as part of the administration or *“administrative police”*. Respondents also indicated they should structurally report separately from any one faculty, school or department and that their physical space needed to represent their distinct position, as both academic in nature, but not affiliated with any specific faculty or school. In each of these examples respondents were evidencing their need to be perceived as occupying a distinct organisational space.

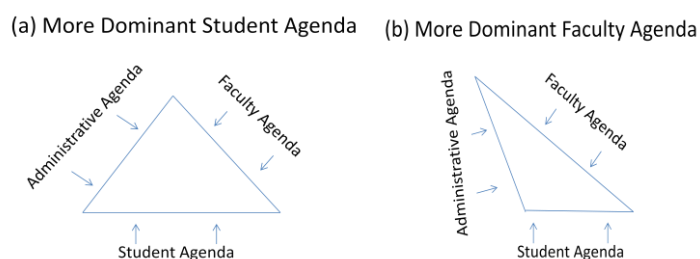
In addition, respondents focused on the importance of language and framing of messages. For example, many respondents indicated their purpose or agenda was *“ongoing enhancement”* towards *“good teaching and learning”*. This agenda would be expected to resonate as vital and sanctioned by all higher education stakeholders however how that agenda is interpreted by various stakeholders is of interest. Faculty might envision *“good teaching and learning”* as engaged and developing students, senior administration might envision *“good teaching and learning”* as positive student feedback reports and increased student satisfaction ratings on league tables and students might envision *“good teaching and learning”* as interesting and organised classes. Awareness of and ability to translate and demonstrate a balanced view between these competing voices while evidencing expertise and alignment to their overarching purpose appears to be an important part of teaching and learning professionals being perceived as having a distinct and valuable organisational space.

In yet another example, respondents were initially resistant to probing regarding the use of *harsh* influence tactics (Kipnis, 1984, Kipnis et al., 1980) stemming from reward and coercive power bases. Part of this reluctance appeared to stem from their awareness that those concepts would be perceived very negatively by the targets of their influence

attempts and undermine their efforts to build trust. Kipnis (1976) pointed out that the very process of surveillance that goes with coercive power contributes to the target having greater distrust of the influencing agent and to further demeaning the target of influence. To overtly discuss direct rewards and punishments that they wield over faculty would run counter to or disrupt the tenuous balance they negotiate as they enter into what has traditionally been considered the domain of faculty work. It is through demonstrating value (such as helping address a faculty members' concerns) and building credibility that teaching and learning professionals appear to build legitimacy in a distinct organisational space.

It's further proposed that this triangular organisational space will vary in form depending on the individual institution, its history, provincial legislative framework and unique culture. In some cases, the student side of the triangle is expected to be longer (a), representing a more significant voice of the student agenda that must be negotiated. In others, (b) the administration or faculty side of the triangle is expected to be longer.

**Figure 7: Potential Organisational Shapes of Educational Development Work**



It is suggested that awareness of the shape or dominance of these often competing agendas may be useful to teaching and learning professionals when they consider which strategies would be most beneficial in the process of legitimising a distinct organisational space. This becomes relevant to status, as the “value of activity within a field or its ‘*capital*’ depends on the degree of recognition accorded to it by dominant actors” (Grenfell and James, 2004). For example, it is suggested that in more traditional research oriented institutions the faculty agenda would be more dominant and to enhance status and enable legitimation teaching and learning professionals may be well served to focus on and to conform to traditional status symbols within the academic space. A clear example of this was demonstrated in the findings. Respondents indicated they were more respected if they held a doctorate degree and had published peer reviewed articles or books, especially if those publications were in the field of educational development. In

institutions with more dominant administrative voices, perhaps demonstrating a clear understanding of compliance, regulatory and reporting needs and interpreting how meeting those requirements could be best communicated and implemented would demonstrate distinctive value to senior administration and would result in the greatest benefit. Finally, it is not suggested that tending to any one of these competing agendas should be the primary focus of teaching and learning professional work, it is simply suggested that awareness of the dominating voices may assist in establishing contextualised priorities towards the overarching goals.

In summary, the findings in this study indicate that the social evaluations of credibility, reputation and status and the creation of distinct organisational space are important mechanisms in the legitimisation process of teaching and learning professionals and educational development work. Further the findings of this study and the associated analysis contributed to the literature in a number of areas.

The following figure summarises the contributions to the literature identified in both the findings and discussion chapters.

**Table 8: Contributions to the Literature**

This study provides the following contributions to the literature:
<ul style="list-style-type: none"> <li>• evidence regarding the evolving roles of teaching and learning professionals</li> <li>• evidence regarding how teaching and learning professionals perceive their identity</li> <li>• evidence regarding how teaching and learning professionals generate power and influence</li> <li>• evidence to support the theorised link between identity and action (Alvesson et al., 2008, Ibarra, 1999)</li> <li>• support for previous research that indicates there is a relationship between roles (structure) and identity (Alvesson and Willmott, 2002, Dutton et al., 1994, Ibarra, 1999, Sluss and Ashforth, 2007)</li> <li>• extension of the debate regarding if teaching and learning professionals should be classified as faculty members (Robertson, 2010, Sorcinelli et al., 2006)</li> <li>• a theorised process of how educational development work may be legitimated in a progressively larger organisational boundary</li> <li>• a theoretical model of the evolving organisational space occupied by teaching and learning professionals</li> </ul>

A number of implications and practical suggestions for practice and policy, intended to support the legitimisation of educational development work, are offered next.



## ***5.4 Implications for Practice***

The findings point to a number of implications and practical suggestions for those who wish to support the legitimization of educational development work in a broader organisational space. First, stemming from the findings, a number of factors which appear to be linked to status are discussed. Then, suggestions intended to support of the legitimization of educational development work are offered for senior institutional leadership and senior teaching and learning professionals. Finally, a recommendation that individual teaching and learning professionals may benefit from developing knowledge, skills and abilities associated with leveraging *soft* power basis, often referred to as *persuasion* (Cialdini, 2001, Conger, 1998, 2008), is presented.

### ***5.4.1 Factors Linked to Status***

The findings of this study indicate that a number of role design factors appear to be linked to status and further the role design factors appear to send intra-organisational cues regarding the purpose or type of work teaching and learning professionals are undertaking.

Relevant role design factors identified in this study include:

- (1) The span of control, such as team size and the variety of functions residing within a centre or unit.
- (2) The reporting hierarchy - where in the organisational chart the teaching and learning professionals report.
- (3) The role classification - the level and type (faculty, non-classified professional, unionized professional) of posts associated with teaching and learning professional work.

Other factors appear to be related to status *via* visibility and the power of influential others. These factors also have the potential to send organisational cues regarding the purpose or type of work.

The relevant factors identified in this study include:

- (1) The physical space occupied by those engaged in educational development work.

- (2) The amount of verbal support and perceived prioritisation of the work by influential others (e.g. Provost, Vice-President Academic, Dean's).
- (3) The amount of documented prioritisation of work (e.g. as indicated in strategic and operational plans).
- (4) A seat at ongoing group meetings (e.g. All Dean's meeting, or Provost's planning council meetings).
- (5) A seat on Governance committees.
- (6) Representation on high profile project teams.

Next, based on the status related factors and other findings identified in this study, suggestions intended to support the legitimization of educational development work are offered for senior intuitional leadership and senior teaching and learning professionals.

#### ***5.4.2 Implications for Senior Institutional Leadership (Provost, Vice-Presidents, President)***

Senior institutional leadership play an important role in setting institutional priorities. If there is a desire to increase the institutional focus on teaching and learning it is suggested that enabling the legitimization of teaching and learning professional work in a wider organisational boundary may assist. In support of enabling legitimization of educational development work senior leadership (particularly the Senior Academic Officer) can:

- (1) Consider establishing a higher level (e.g. Vice-Provost, Director, etc.) post, with an increased span of control, reporting to the senior academic officer in the institution (consolidation creates visibility and status).
- (2) Give thoughtful consideration to the appropriate type of post (faculty, non-union management, etc.) and what opportunities or limitations that type of post may bring to the incumbent as well as internal and external equity issues. In the same vein, consider lending positional support to assist the senior teaching and learning professional work with the human resources and labour relations departments to set the appropriate type and level of posts within the teaching and learning team.
- (3) Carefully select and recruit the senior teaching and learning professional with an eye to status, reputation and credibility amongst Deans, senior administrative leaders and faculty (the senior teaching and learning professional plays an

important role in the visibility and the amount of access to others their team acquires).

- (4) Consider the profile and visibility of the space provided to the teaching and learning team.
- (5) Consider articulating clear teaching and learning goals in institutional and academic documents.
- (6) Consider including the senior teaching and learning professional in the Senior Academic Officers ongoing meetings (e.g. all Dean's meeting, Provosts council, etc.).
- (7) Consider revisiting governance committee structures with an eye to teaching and learning decisions. For example - Where are these decisions housed today? Does the existing decision making structure support organisational goals? Are teaching and learning professionals appropriately represented in these decision making groups?
- (8) Consider inviting teaching and learning professionals to be part of high profile project teams.
- (9) Consider the alignment of operational funding models to organisational goals. For example - Is educational development work a temporary project or an ongoing "core" part of the institution?
- (10) Consider providing the teaching and learning team research grants or funds to manage.
- (11) Be conscious about how their opinions, comments and actions send strong organisational messages regarding the priorities and values of the institution.

*"...the fact that we have an Associate Vice President Research and we have a Director of Teaching and Learning really says it all." (Senior Teaching and Learning Post – research focused institution)*

### **5.4.3 Implications for Senior Teaching and Learning Professionals (Centre Director, Associate-Vice Provost, etc.)**

As described in the findings, the senior teaching and learning professional plays an important role as the spokesperson and figurehead of the teaching and learning team. In some small institutions they are the teaching and learning team. Respondents indicated if the senior teaching and learning professional has a good reputation and is considered credible that doors are opened for the entire team. If not, it is much more difficult for

teaching and learning professional team members to get access to other departments and faculty members.

In support of legitimising educational development work, it is suggested that senior teaching and learning professionals can:

- (1) Articulate a departmental mission, vision and value proposition. Visibility and communication were described as significant challenges by respondents. Having a clear mission, vision and value proposition are expected to enable the creation of a distinct organisational space by providing clarity and consistency. Further, it provides a tangible message for the senior leader to reach out with, to speak about and hopefully to build bridges with.
- (2) Work with the human resources and labour relations departments to get an appropriate level and type of role classifications and pay grades for teaching and learning professional team members. Take into consideration the opportunities or limitations that classification may bring to the incumbents as well as internal and external equity issues.
- (3) Carefully recruit and select teaching and learning professionals with an eye to status, reputation and credibility. In this study, teaching experience, academic credentials and research experience were all identified as having an impact in these areas. Remembering, it is much easier to maintain legitimacy than to gaining or repair it (Suchman, 1995).
- (4) Be conscious about how their status, reputation and credibility can influence the status and reputation of the entire teaching and learning team and, as a result, can impact opportunities for the team to meet with others and to accomplish their goals.
- (5) In larger centres, create new communication channels to keep team members abreast of changes and new processes to manage workload distribution. If the team themselves are not familiar with what the team can offer they are not in a position to take that message out to the broader institution. Leveraging the talent of a large team requires new structures. Four respondents in large centres indicated intra-department communication was a significant issue.

*“When we were a small group we all knew what was going on... now, we’re trying to find ways to keep track of what the people are doing... unless they’re announcing they are putting together something or they’re presenting on it, you may not even know their expertise.” (Educational Development Post)*

Whilst these implications for senior institutional leadership and senior teaching and learning professionals have been presented as suggestions for practice many of these suggestions have broader implications for organisational policy. For example, changes in organisational design and structure to consolidate teaching and learning efforts and the creation of a senior teaching and learning post have broad reaching organisational impacts. The key message offered for practice here is that if an institution wants educational development professional work to expand beyond the historical organisational boundary, it is recommended that this intent be managed strategically. One of the key tenants of strategic management and organisational change theories is the importance of alignment: alignment of structures, alignment of processes, alignment of controls and alignment of leadership action. The offered areas of implication provide insight from the findings regarding what structural, process, control and leadership action variables are seen by teaching and learning professionals as relevant to enabling their work and may serve as a useful starting point to reflect upon alignment in key areas.

Senior institutional leadership and senior teaching and learning professionals play an important role in the legitimisation of educational development work however it is suggested that the contribution of teaching and learning professional work is demonstrated as individual teaching and learning professionals interact with others and attempt to influence teaching and learning practices and policies. Considering the evolving role of teaching and learning professionals and the importance of influence in accomplishing their work, it is offered that individual teaching and learning professionals and perhaps others in change oriented roles would benefit from increasing their knowledge, skills and abilities in the use of persuasion.

#### ***5.4.5 Persuasion – Applying the Science of Social Influence***

*“Persuasion skills exert far greater influence over others’ behaviour than formal power structures do.” (Cialdini, 2001, p.72)*

It has been argued throughout this study that teaching and learning professionals hold change oriented roles that require influence to accomplish their goals. Although power was theorised as an important construct to gain an understanding of educational development work, the findings and subsequent analysis pointed to the importance of distinguishing between *soft* and *harsh* power bases (Kipnis, 1984). As evidenced in the findings, much of the work of teaching and learning professionals, and arguably any

change oriented role in a university, is tied to their ability to persuade others. Persuasion literature, similar to much of the *soft* power bases (Kipnis, 1984) literature, assumes that the agent of influence is not able to or does not wish to use direct punishment and rewards to influence, that they wish to provide the targets of influence with more freedom and autonomy (Pierro et al., 2008). To accomplish their work, it is suggested that teaching and learning professionals and perhaps others in change oriented roles would benefit from increasing their knowledge, skills and abilities in the use of persuasion.

Behavioural scientists have conducted experiments for the past six decades that shed considerable light on the way certain interactions lead people to concede, comply, or change (Cialdini, 2001). Whilst the findings indicate many teaching and learning professionals are following some of the recommendations of researchers regarding how to persuade others, no respondents specifically made reference to or indicated awareness of this literature. Following an expanded review of the social influence literature a vein of academically based publications targeted to practitioners regarding persuasion was revealed. Much of this literature resonates as applicable and useful in a higher education context.

It is suggested that using direct punishment and rewards is at odds with historical norms and values of faculty autonomy and that the organisational structures and practices of most universities do not enable the centralised use of direct punishment and rewards. It is further suggested that in higher education institutions newer change oriented roles, such as those described by Whitchurch (2008c) as residing in the *third space*, are rarely empowered with great amounts of power to directly punish or reward. As a result, and supported by the findings in this study, it is assumed that most influence attempts by teaching and learning professionals will not leverage the use of direct punishment and reward power, but will, leverage *soft* power bases (Kipnis, 1984) and persuasion skills. Based on those assumptions and the analysis of these findings, it is suggested that the literature associated with social influence and persuasion could be utilised to develop knowledge, skills and abilities that are expected to benefit teaching and learning professionals and others in change oriented roles. To further support this suggestion and to demonstrate alignment to the findings a brief overview of persuasion literature from two well known authors are discussed next.

The following literature regarding persuasion, written by Robert Cialdini and Jay Conger respectively, leverage knowledge acquired from behavioural research on social influence, however they present a more prescriptive or application oriented perspective.

Drawing on research from a number of sources, including his own Cialdini (2001) describes six fundamental principles of persuasion. While targeted to executives for application in their organisations, the principles resonate as particularly relevant to the change oriented roles of teaching and learning professionals.

The six fundamental principles are as follows:

1. **Liking:** people like those who like them. Therefore to increase liking, focus on similarities and praise. It is recommended to look for and discuss similarities early “because it creates a presumption of goodwill and trustworthiness in every subsequent encounter” (Cialdini, 2001, p.74). It is also recommended to be liberal with praise as it “generates affection, charms and disarms” (Cialdini, 2001, p.74).
2. **Reciprocity:** people repay in kind. It is recommended to, “model the behaviour you want to see from others” (Cialdini, 2001, p.75). Individuals, “can elicit the desired behaviour from co-workers and employees by displaying it first – a sense of trust, a spirit of cooperation, or a pleasant demeanour” (Cialdini, 2001, p.75).
3. **Social Proof:** people follow the lead of similar others. It is advised that “...persuasion can be extremely effective when it comes from peers...influence is often best exerted horizontally rather than vertically” (Cialdini, 2001, p.75).
4. **Consistency:** People align with their clear commitments. “People need not only to like you but to feel committed to what you want them to do. Good turns are one reliable way to make people feel obligated to you. Another is to win a public commitment from them” (Cialdini, 2001, p.76). “Most people, once they take a stand or go on record in favour of a position, prefer to stick to it” (Cialdini, 2001, p.76).
5. **Authority:** people defer to experts. It is recommended to “establish expertise early in the game, so...what you have to say will be accorded the respect it deserves” (Cialdini, 2001, p.78). “Surprisingly often, people mistakenly assume that others recognize and appreciate their experience” (Cialdini, 2001, p.78).
6. **Scarcity:** people want more of what they have less of. It is suggested that “...framing, not only in terms of what people stand to gain but in terms of what

they stand to lose if they don't act on the information" (Cialdini, 2001, p.78) is of value.

Certainly the use of these principles was supported in the findings. For example: respondents indicated that they were liberal with praise and focused on developing a relationship of trust (*liking*), that they needed to demonstrate respect and focused on being positive (*reciprocity*), that they were invited to participate in meetings and other activities based on their relationships with others (*social proof*), that faculty who were involved in facilitating educational development workshops were usually very committed to teaching and learning priorities (*consistency*), that demonstrating ideas backed by evidence enabled them to influence (*authority/expertise*) and finally that framing or positioning suggestions in terms of resource availability was useful when influencing (*scarcity*). Whilst the narratives of some respondents demonstrated practical use of one or more of the principles, none of the respondents indicated or demonstrated awareness of or use of all the principles.

Conger's (1998, 2008) model of how to effectively persuade others also resonates as useful and relevant for teaching and learning professionals. Based on research from a number of sources, including his own, Conger (1998, 2008) focuses on four essential steps to effectively persuade others:

- (1) establish credibility,
- (2) frame goals in a way that identifies common ground with the target,
- (3) reinforce positions using vivid language and compelling evidence, and
- (4) connect emotionally with the target(s).

Conger (1998) states that, "in the workplace, credibility grows out of two sources: expertise and relationships." People are considered to have high levels of expertise if, "they have a history of sound judgement or have proven themselves knowledgeable and well informed" (Conger, 1998, p.88). "On the relationship side, people with high credibility have demonstrated – again, usually over time – that they can be trusted to listen and to work in the best interests of others" (Conger, 1998, p.88).

The narratives of respondents in this study also support this model. Respondents' narratives indicate each of the four steps have been relevant in their successful persuasion attempts. Also, credibility was a central theme discussed by respondents. Respondents described that demonstrating relevant expertise and building relationships



of trust were central components in how they earned credibility and that acquiring credibility was an important factor towards enabling influence.

To support the accomplishment of their goals, it is suggested that research based, practitioner targeted, literature, such as those just discussed, in combination with context specific examples, could provide a foundation to develop highly useful training for those in teaching and learning roles. It is further suggested that a similar approach may be of value for a wide variety of change oriented roles in universities. However, it is important to emphasise that the rules of ethics apply to the science of social influence and the use of persuasion (Cialdini, 2001, Cialdini and Goldstein, 2004, Conger, 1998, Conger, 2008). It is “legitimate expertise, genuine obligations, authentic similarities, real social proof, exclusive news, and freely made commitments can produce choices that are likely to benefit both parties” (Cialdini, 2001, p.79). “Like power, persuasion can be a force for enormous good in an organisation. It can pull people together, move ideas forward, galvanize change, and forge constructive solutions” (Conger, 2008, p.55).

In this section, a number of implications and practical suggestions were offered for those who wish to support the legitimisation of educational development work in a broader organisational space. Both senior institutional leadership and senior teaching and learning professionals are identified as having a significant part to play in the legitimisation of educational development work. Most notably the number of ways which they have the ability to influence status was identified. For clarity, these factors from the findings which appear to be linked to status were consolidated and presented. Stemming from the status factors and other findings relating to reputation, a number of suggestions intended to support the legitimisation of educational development work were offered for senior institutional leadership and senior teaching and learning professionals. Finally, it was suggested that the actions of individual teaching and learning professionals play a central role in the legitimisation of their work. To support their efforts it is suggested that individual teaching and learning professionals may benefit from developing knowledge, skills and abilities associated with using persuasion.

In summary, this chapter provided a detailed discussion on both theoretical and practical implications arising from the findings. A thorough analysis of the findings evidenced the linkages between role, identity and power, informed the creation of a theorised process of how educational development work may be legitimated in a progressively larger organisational boundary and informed the creation of a visualised

model depicting educational development work, residing between the agendas of faculty, administration and students. Moreover, based on the analysis, a number of implications and practical suggestions stemming from the findings were offered for those who wish to support the legitimization of educational development work in a broader organisational space.

The following and final chapter reflects on the overall outcomes in terms of whether the findings have answered the research questions to successfully meet the aims of the study. The concluding arguments are brought together, reflecting on the limitations of the study and leading to implications for practice and ideas regarding potential directions for future research.

## ***Chapter 6 – Conclusions***

### ***6.1 Introduction***

In this chapter the starting point for the study (the context and research questions) are brought together with a synthesis of the themes detailed in the findings and discussion chapters. The strengths and limitations of the study are discussed and suggestions for future research are presented.

### ***6.2 To the Beginning and Back Again***

It has been argued throughout this study that the broader contextual changes coupled with a stronger literature base in the scholarship of teaching and learning and significant advancements in technology have positioned teaching and learning professionals to play more predominant, change oriented roles, in their institutions. In light of this potential, this study aimed to explore how teaching and learning professional work is evolving. To do so, the study was underpinned by the following three research questions: (1) how are teaching and learning professional roles evolving, (2) how do teaching and learning professionals perceive their identity, and (3) how do teaching and learning professionals generate power and influence? The data gathered provided evidence to answer each of the research questions and provided a basis for developing understandings and new insights regarding the relationship between roles, identity and power and how the organizational space occupied by teaching and learning professionals is evolving.

The findings paint a picture of a quickly evolving field with a growing number of teaching and learning oriented roles at various levels being consolidated into teaching and learning centres that structurally report up through the senior academic office. In parallel with this change, the shift in general purpose of these roles from that of “*reactive remediation*” to that of “*ongoing enhancement*” is enabling some teaching and learning professionals to more proactively interpret their roles. As the responsibilities housed under the umbrella of teaching and learning centres grow, the functions and duties of teaching and learning professionals are shifting. In some cases, technology focused posts are shifting from “*production oriented*” course creation to “*development oriented*” technology integration, while other posts, such as roles dedicated to curriculum development, are narrowing and becoming more specialized. Teaching and learning professionals are holding higher academic credentials and are more consistently involved

with the creation and distribution of research. Moreover, the existing unionized environments and ongoing changes in role expectations have created a number of challenges and tensions related to inconsistent role classifications and inconsistent pay scales.

A shared sense of identity for teaching and learning professionals appears to be emerging. A shared purpose underpinned by a shared set of values and supported by strong professional association identification is enabling the creation of an emerging identity, linked to bridging and translating between various stakeholder needs. However, how teaching and learning professionals orientate themselves to their work and take action appears to be related to a range of contextual variables, such as the individual's hierarchical placement, the institutional type and how visible, credible and embedded the work of teaching and learning professionals is perceived to be at a specific institution. Tensions associated with a lack of visibility and with other institutional members not understanding their roles are quite widely felt but are particularly acute in those focused on educational technology.

Whilst teaching and learning professionals use a variety of power bases and influence tactics to generate change at the individual, group, organization and system levels, their influence attempts primarily leverage *soft* power bases rather than *harsh* bases (Kipnis, 1984). Moreover, the status and the reputation of their centre, their centre senior leader and themselves personally appear to be important foundations which enable their attempts to influence.

An interesting outcome of the findings was the evidence of interconnectivity between role, identity and power. In this study, the interconnectivity of role, identity and power, was expressed through respondents attempts to make sense of and in many cases change the social evaluations of them, their team and their work. It appears this was done in an effort to legitimise a distinct organisational space for their work and enable them to accomplish their change oriented goals. Based on the analysis of this interconnected relationship, a theoretical process of legitimation for educational development work is proposed. In essence, it is suggested that, in this context, the social evaluations of role status and reputation work in conjunction with the processes linked to establishing credibility and that they are key mechanisms in legitimation. Also, based on these findings, a theoretical model representing the emerging organisational space for

educational development work, between the agendas of administration, faculty and students, is offered.

The overarching pattern suggested by the findings is that in some institutions, a larger more focused space between the traditional boundaries of faculty and administrative domains is being established for educational development work. Moreover, this space is being framed by a third voice, that of the student.

A number of implications for practice and policy, intended to support the legitimization of educational development work are also offered. The findings indicate senior institutional leadership and senior teaching and learning professionals have a significant role to play in the legitimization of educational development work. As a result, a number of suggestions impacting practice and policy targeted to senior institutional leadership and senior teaching and learning professionals are made. Further, recognising the centrality of influence to those occupying change oriented roles it is suggested that teaching and learning professionals may benefit from developing knowledge, skills and abilities associated with using *soft* power bases, often referred to as persuasion (Cialdini, 2001, Conger, 1998, 2008).

The aims of this study have clearly been met. The research questions have been answered and further, they have been extended through an in depth analysis of the findings to contribute to theory and to practice. While every effort has been made to design and implement this study to maximize its value, no study is without limitations. The following section reflects on the limitations of this work.

### ***6.3 Limitations***

There are limitations pertinent to the generalisability of the results presented in this thesis. This research was conducted within Canadian institutions and targeted to a cross-section of teaching and learning professionals in three general categories. First, as described in the Canadian context section, the Canadian higher education system has no federal or national department of education and it exists within a decentralized model of control. While Jones (2000) provides compelling evidence to conclude that the Canadian university sector is relatively homogeneous from a system and structural perspective, it could be argued that each province into itself is a separate and distinct higher education system. Although every effort was made to ensure representation from all provinces, two

of the ten provinces are not represented<sup>7</sup>. While the data analysis did not indicate significant variations, based on province, the relatively small sample size and geographic distribution of the respondents leaves room for questions regarding the generalisability of the findings across the Canadian higher education system. Further, although the results of this study may provide interesting and useful insights to others outside of Canada, it is not suggested that the findings of this study are generalisable beyond this boundary.

The cross-sectional design of the sample may similarly be questioned. In cross-sectional designs researchers will often select similar roles in multiple case organisations. One option might have been to identify a sample of institutions that had a senior teaching and learning post, educational development post and educational technology post and then attempt to interview all three roles from each institution. This design may have enabled a more nuanced cross-case comparison and potentially provided additional corroboration of individual perspectives within individual institutions. However, if the research design used similar roles in multiple case institutions, the geographic representation and representation of mid-size and smaller universities with a sole contributor or a small team would have been lost. Moreover, given the evolving nature and quickly shifting functions of teaching and learning roles, it was believed that the process of identification of similar roles would narrow the focus potentially resulting in a loss of the depth and breadth of role variety represented. For clarification, in this study, one institution had a respondent from each of the three primary categories and three institutions had respondents from two of the three primary categories.

A limitation of the research design is that only the perspective of those occupying teaching and learning professional roles was captured. Neither the perspectives of faculty, nor senior institutional leadership have been included. Given the target of teaching and learning professional work has traditionally been faculty, including faculty perspectives was considered in the research design, but it was decided that this was not the focus of this exploratory study. In light of the findings, it is now believed that adding the perspectives of both faculty and senior institutional leadership are important to test the theoretical process proposed and validate many of the recommendations offered for professional practice.

Finally, the benefits of choosing a qualitative inquiry are limited to some degree by its subjective nature. While this is an acknowledged strength, it can also be considered a

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<sup>7</sup> While the three Canadian territories have tertiary education systems, they do not have any Universities.

limitation. Qualitative researchers can be criticized for compromising the credibility of their research by contaminating the data analysis with their own values and ideas. Hence selection and interpretation of data can be challenged. I have been acutely conscious of this potential drawback and have addressed this through a rigorous approach to data handling, constantly revisiting the original data and critically examining my interpretations of them.

We now turn to the future and consider the potential opportunities for further research that stem from the findings and discussion in this study.

## 6.4 Opportunities for Further Research

Several themes for future research have emerged from the findings. The following table lists these suggestions.

**Table 9: Opportunities for Further Research**

Opportunities for further research include:
<ul style="list-style-type: none"> <li>• Develop a greater understanding of how other organisational actors perceive the purpose, roles and legitimacy of teaching and learning professionals</li> <li>• Further validate and explore the wider implications of an emerging bridging and translating identity for teaching and learning professionals</li> <li>• Develop greater insight into the enablers or barriers of Educational Technology Professional work</li> <li>• Develop greater insight into how the roles, identity and power are evolving in other key <i>third space</i> work</li> <li>• Examine how other newer change oriented roles are legitimated</li> <li>• Leverage the social psychological constructs identified in this study (credibility, legitimacy, status and reputation) at the individual and group level in other organisational contexts</li> <li>• Further research the link between identity and behaviour leveraging the construct of power and influence</li> </ul>

Multiple aspects of how other organisational actors perceive educational development work could be explored in future research. As discussed earlier, a larger organisational boundary for educational development work requires carving out a piece of work that was historically within the domain of faculty. A study involving faculty members who are working in partnership with teaching and learning professionals and contrasting it to the views of other faculty members, perhaps those somewhat involved and those not involved in working with teaching and learning professionals may garner additional insight into what barriers exist and what factors enable educational

development work. Additionally, this research may provide additional insights regarding the legitimization of educational development work. Moreover, further research that contrasts the alignment and impact of senior institutional leadership's actions and views regarding educational development work with that of faculty and teaching and learning professionals may provide insight into the nuances of how senior leadership impact status and reputation in the broader organisational context.

Research could further validate and explore the wider implications of an emerging bridging and translating identity for teaching and learning professionals. This may develop greater insight into characteristics, dynamics or subtle differences associated with how teaching and learning professionals identify with their work. Further, it may be interesting to test this finding beyond Canada. This may generate additional insight regarding the impact of professional associations, institutional structure and the perceived purpose on identity formation.

Research could develop greater insight into the enablers or barriers of Educational Technology Professional work. The findings in this study imply that other institutional actors have low awareness and understanding of what Educational Technology professionals can do for them. Moreover, with the advancements in technology and students use of technology, these roles have a particularly significant opportunity to impact creative solutions to teaching and learning. For example, it may be interesting to target highly influential educational technology respondents and/or highly influential technology teams to explore what they believe are enablers or barriers to their work.

Teaching and learning professional roles are but one area of the newer and evolving roles put in place by higher education institutions with the intent to accomplish desired or required changes. To gain a better understanding of the evolving organisational landscape in higher education it would be helpful to develop a greater understanding of how other key *third space* roles, identity and power are evolving. Utilizing these three constructs in parallel has generated useful insights into how teaching and learning professional work is evolving. Additional research in this form would also contribute to the recommendation that future studies could look at the “what” questions, what people actually do at work, material and institutional arrangements, such as divisions and hierarchies of labour as manifested in job titles, reporting structures, salaries and special privileges to explore the nuances of identity formation (Alvesson et al., 2008).



Research that examines how other new and/or newer, change oriented roles are legitimated may prove useful. Legitimacy gives the implications of “should” or “ought to” comply (French and Raven, 1959). Different roles have different primary stakeholders, therefore the targets of their persuasion attempts and/or change efforts vary. This is a central issue for legitimacy research, that of identifying who has collective authority over legitimation in any given setting (Deephouse and Suchman, 2008). Research in this vein may uncover if there are similar or different variables and/or behaviours which enable or act as boundaries to them building legitimacy. Further, in recognition that change oriented roles need to use persuasion and influence to accomplish their work it would be valuable to identify what are the catalysts, variables and mechanisms that impact this process for other newer change oriented roles. It may also prove useful to look at newer change oriented roles in contexts beyond higher education, such as professional services firms. Future research could contrast the similarities and differences between the proposed process of legitimation for educational development work to other new and evolving fields, which may potentially draw out fresh insight and more generalisable findings regarding the legitimation of new roles and new fields of practice.

There is little research that leverages the psychological constructs identified in this study (credibility, legitimacy, status and reputation) at the individual and group level. Most research leveraging the constructs of reputation and legitimacy centre on the organisation as a unit of analysis (Deephouse and Suchman, 2008). Further, much of the management research utilising the construct of credibility and source credibility are primarily designed in an attempt to determine how to effectively persuade consumers (Pornpitakpan, 2004). It also may prove useful to look at these constructs in other contexts beyond higher education. As demonstrated in this study, there are useful insights to be garnered in relation to what variables influence these social attributions and how that knowledge may enable organisational change agents.

The constructs of power and influence proved to be a useful lens to uncover linkages between identity and behaviour. It is suggested that future studies could contribute to our understanding of these linkages by exploring the relationship of these constructs in a variety of contexts and focusing on a variety of roles.

## ***6.5 Final Remarks***

In light of contemporary challenges, higher education institutions are called upon to, “to educate more students, with greater learning outcomes, at lower costs” (Mehaffy, 2012, p.28). As an institution’s mission and goals shift, so must its organisational structures, policies, procedures and culture if it is to reach its full potential. In response to these pressures universities have been changing. Existing roles and functions are evolving and new roles and functions are being created with the intent to enable desired, or at times required, changes. However, organisational change in higher education is complicated. Higher education institutions are very complex and differentiated (Clark, 1983) and have been broadly criticized for inefficiency, indifference to external constituencies, and resistance to change (Ruben, 2005). The long history and deeply embedded but decentralised culture of many higher education institutions also make broad based organisational changes particularly challenging. While there are cases of organisational development that provide some indication that higher education institutions are indeed able to change (see e.g. Sporn, 1996; Clark, 2001; Norgaard et al., 2001), it is far from clear from the emerging literature, which factors are crucial catalysts or important process variables that support change initiatives (LeBlanc et al., 2013). My hope is this work contributes a very small piece to this much larger puzzle.

## Appendix A Interview Topic Guide and Questionnaire

### 1. Current role/identity

- Please describe the key elements of your role and what makes you successful in it?
- What kind of professional do you see yourself as?
- How located in terms of:
  - Professional – expertise, ethos, skills?
  - Manager – resources, people, knowledge?
  - Post-professional/project worker?
- What are the main challenges do you face in fulfilling your role?
- Have you ever felt subject to role or identity conflict? In what way?

### 2. Relationship to colleagues

- Key interfaces eg:
  - Academic staff
  - Other professional staff
  - Students
- Areas of overlap with other professionals/academic managers/academics
- Whom do you regard as your peer group internally/reference group externally?
- Relationship type? - service, partnership, other
- How valued – by others; self

### 3. Membership of broader institutional community

- Voice – how heard
- Formal and informal modes, e.g. governance involvement
- Legitimacy
  - Where do you 'belong'?
  - What is your distinctive contribution/nature of influence?

### 4. External working

- How extensive
- How crossing boundaries between university and external partners

### 5. Bases of Power/Influence

(interviewer will provide brief descriptions of Raven &

French's 5 bases of power: reward, coercive, legitimate, referent & expert)

- Are these power bases foundations which impact your ability to generate influence in your role?
- If so, can you provide an example of how you have used the power base in the past to influence others?
- When you don't have a power base to leverage what influence tactics have you used?
- Is this list complete? If not, what is missing?
- How does your placement in the organizational structure affect your role?
  - Is there any tie between your place in the structure and your personal & professional identity?
- How does your placement in the organizational structure help you generate power and influence?
- How does your placement in the organizational structure hinder your ability to generate power and influence?

### 6. Future

- Where do see your career going?
- How do you plan to get there?

### 7. Professional Development needs

- What type of intervention – formal/informal
- Qualifications? What sort?
- Knowledge/skills base
- Mentoring – by whom?
- Likely future trends

### 8. Implications for career pathways

- Changes in career profiles
- Mobility/movement across and outside sector
- Generic skills/knowledge
- How should junior staff in your type of role prepare themselves for their careers?
- Recruitment/retention

## QUESTIONNAIRE

Institution: \_\_\_\_\_

Name of interviewee: \_\_\_\_\_

Note: The above information is to be removed when the questionnaire is anonymised for purposes of analysis

**1. Anonymity Code:** \_\_\_\_\_  
(for completion by researcher):

**2. Gender:** \_\_\_\_\_

**3. Generic title of current post:** \_\_\_\_\_  
e.g. Instructional Designer, Curriculum Coordinator, Teaching and Learning Manager, etc.

**4. Grade of post:**            **Administrator**            **Officer**            **Other** \_\_\_\_\_

**5. Current institutional location:** \_\_\_\_\_  
(e.g. Corporate department, School, Faculty, Academic department)

**6. Reporting line:** (e.g. Quality Manager, Dean, IT Manager, Teaching & Learning Director)

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**7. Specific area of work (one sentence):**

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**8. Does your job include:**

Management of staff?	Yes	No
Management of a budget?	Yes	No

**9. Number of years in current post:** \_\_\_\_\_

**10. Qualifications (please circle all appropriate):**

Bachelor's degree

Postgraduate diploma

Professional Accreditation e.g. HR,  
Legal, Finance, Accountancy, etc.  
(please specify):

Doctoral degree/PhD

Other (please specify):

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Master's/MBA degree

**11. Belong to any Professional Associations?**

Yes

No

If yes, which ones?

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**12. Age band (please circle one):**

50+  
40-49  
30-39  
20-29

**13. Number of years in post secondary administration/management (please tick box):**

Years	
30 +	
20-29	
10-19	
5-9	
Up to 5	

**14. Have you taught post secondary courses?**

Yes

No

**15. Were you ever a continuing/tenured faculty member at a post secondary institution?**

Yes

No

**16. Number of Post Secondary institutions worked in:**

Colleges	
Polytechnics	

Universities	
Other	

**17. Number of year's experience outside post secondary sector:**

Public sector: \_\_\_\_\_

Private sector: \_\_\_\_\_

Please give brief description of type of non-post secondary organization(s) worked in:

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**18. Professional development activities in the last three years:**

Study leading to qualification: Yes No  
(if "yes" please specify)

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Training (in-house or external) related to professional practice (not leading to qualifications):  
Yes No (if "yes" please specify)

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Attending seminars/conferences: Yes No

Mentoring: Yes No

Presenting at seminars/conferences: Yes No

Authoring of published papers/monographs: Yes No

**19. Professional reading:**

Professional journals (please specify):

\_\_\_\_\_ Regular Occasional

\_\_\_\_\_ Regular Occasional

\_\_\_\_\_ Regular Occasional

\_\_\_\_\_ Regular Occasional

\_\_\_\_\_ Regular Occasional

Books related to professional practice: Regular Occasional

**20. Job description – if you are willing to let me see your job description, I should be grateful if you could provide it.**

## **Appendix B**   Introductory Email

Dear \_\_\_\_\_,

Would you would be willing to be interviewed as part of my doctorate research in higher education management?

I hope to gain insight into the roles, opportunities and challenges of higher education professionals who are involved with the teaching and learning practice of academics. I am specifically interested in speaking with educational technologists (online or classroom based), educational developers and teaching and learning centre directors/managers.

Participation would entail a telephone or a Skype interview of approximately one hour. Your name and institution would be kept confidential.

Please let me know if I may contact you to set up an interview.

Kind regards,

Sheila

## Appendix C Participant Consent Form

### Consent

#### The Researcher

My name is Sheila LeBlanc, and I am a Canadian Doctor of Business Administration student at the University of Bath specializing in higher education management <http://www.bath.ac.uk/management/dba/>. I'm also a contract administrator and lecturer at the University of New York in Prague and I've previously held both faculty and administrator roles in two Canadian post-secondary institutions.

#### The Research

The purpose of this study is to gain insight in to a specific group of Higher Education professionals, those who support and influence the teaching and learning practice of academics.

The research themes focus on:

- The roles, responsibilities and identity of teaching and learning professionals
- The interfaces between these roles and institutional colleagues
- How the role is imbedded into the broader institutional community
- Linkages to the external community
- Bases of influence, influence strategies
- Career pathways and future aspirations
- Professional development needs
- Implications for career pathways

At a functional level, a better understanding how these roles are evolving may inform the job design, recruitment and development practices for these positions. At a strategic level, this knowledge may inform organizational design and organizational development initiatives. From an academic perspective, the study's findings will add to the scarce literature describing professional roles in Canadian higher education.

#### My research supervisors are:

Professor Ian Jamieson <http://www.bath.ac.uk/vc/staff/profiles/imj.htm> and

Professor Juani Swart [http://www.bath.ac.uk/management/faculty/juani\\_swart.html](http://www.bath.ac.uk/management/faculty/juani_swart.html)



## **The Process**

Your participation in the study will involve an interview with an estimated length of one hour during which I will ask questions regarding the topics above and request demographic data. This interview will be digitally recorded and transcribed, unless requested otherwise by the participant. There may be additional follow up/clarification through email, unless otherwise requested by participant. Privacy will be ensured through confidentiality. Participation is voluntary and the interviewee has the right to terminate the interview at any time.

Insights gathered from you and other participants will be used in writing a qualitative research thesis, which will be read by my academic supervisors, graduate committee and made available through the University of Bath library. The research may also be submitted for publication. Though direct quotes from you may be used in the paper, your name and institution name will be kept anonymous.

Please contact me with any questions or concerns.

## **Risk**

This study poses little to no risk to its participants. I will do my best to ensure that confidentiality is maintained by not citing your actual name within the paper. You may choose to leave the study at any time, and may also request that any data collected from you not be used in the study.

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By signing below I acknowledge that I have read and understand the above information. I am aware that I can discontinue my participation in the study at any time.

Signature\_\_\_\_\_

Date\_\_\_\_\_

## **Appendix D** Power Bases - Simplified Definitions

### Bases of Power (Raven & French, 1959)

#### **1. Referent Power**

Referent power is also called as personal power, charismatic power, and the power of personality.

#### **2. Legitimate Power**

Legitimate power is also known as position power and official power.

#### **3. Expert Power**

Expert power is also known as the power of knowledge. It comes from expert knowledge and skills.

#### **4. Coercive Power**

Coercive power is the ability to punish others or to pose a threat to others. Coercive power uses fear as a motivator.

#### **5. Reward Power**

Reward power is opposite to coercive power. It is the ability to reward others.

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# ***ADDENDUM: Exploring Whitchurch's 'third space' in Relation to Canadian Teaching and Learning Professionals***

## ***Introduction***

Higher education literature presents a picture where the work and roles in higher education are typically binary in nature, identified either as *faculty* or as *administration* (Deem, 1998, Del Del Favero and Favero, 2003, Ewell and Ewell, 1989, McMillen, 2002). However, contemporary higher education institutions are being pressured to adapt to significant environmental changes such as a mass rather than an elite system, a student body that is more diverse and growing in influence, and significant steering from government through funding systems and quality assurance schemes (Altbach et al., 2009, Dearlove, 2002, Deem and Brehony, 2000, Lambert, 2003, Marsh, 2007, Mehaffy, 2012, Trow, 2000, Yelder and Codling, 2004). In response to these pressures institutions have been changing. New streams of activity are emerging and new roles are evolving to support these new streams. In recognition of these changes, a concept of an additional domain of work activity identified as the *third space* (Whitchurch, 2008d) is developing. Moreover, associated with the emergence of new functions and new domains of work, new identities are forming within the higher education sector (Bacon, 2009, Land, 2004, Whitchurch, 2008b).

Whitchurch's work (2008b, 2008e, 2009) explores the evolving roles and identities of a broad range of higher education professionals working in the *third space* from the UK, Australia, and the US. As part of this work, she observed that this new work domain, the *third space*, is occupied by increasing numbers of *blended professionals*, professionals who have responsibilities that span both academic and administrative functions (Whitchurch, 2008d, 2009). This paper aims to contribute to Whitchurch's *third space*

theory with data from the Canadian context and to further extend her work by contributing insights acquired from interviews with a particular group of *blended professionals* regarding how their work is evolving.

In contrast to Whitchurch's work, this study is centred on higher education professionals in one area only, the field of educational development, which has been and continues to change significantly in contemporary higher education institutions (Austin and Sorcinelli, 2013, Rice, 2007, Schroeder, 2011, Sorcinelli et al., 2006, Wehlburg and Chadwick-Blossey, 2004). Mehaffy, Vice-President Academic Leadership and Change at the American Association of State Colleges and Universities (AASCU) asserts that in response to contemporary changes higher education institutions are called upon to, "to educate more students, with greater learning outcomes, at lower costs" (Mehaffy, 2012, p.28). In alignment with this view, and coupled with a stronger literature base in the scholarship of teaching and learning and significant advancements in technology it is believed that teaching and learning professionals are positioned to play more predominant, change oriented roles in their institutions. It is for these strategic reasons that teaching and learning professionals, professionals in the field of educational development, were the focus of this study.

The following approach is taken to explore Whitchurch's *third space* in relation to Canadian teaching and learning professionals. First, a brief introduction to *third space theory* and the characteristics of *blended professional* roles are presented. Then, a short overview regarding the study methodology is provided. Next, findings, from a qualitative cross-sectional study with 28 Canadian teaching and learning professionals, are discussed in relation to Whitchurch's *third space* and in relation to her key observations regarding *blended* professionals (Whitchurch, 2008d, Whitchurch, 2009) in the UK, Australia and the US. Finally, emerging from the Canadian based study and Whitchurch's findings regarding



the concerns of building legitimacy, insight regarding how Canadian teaching and learning professionals perceive their organizational space and the potential impacts to other *third space* roles are discussed.

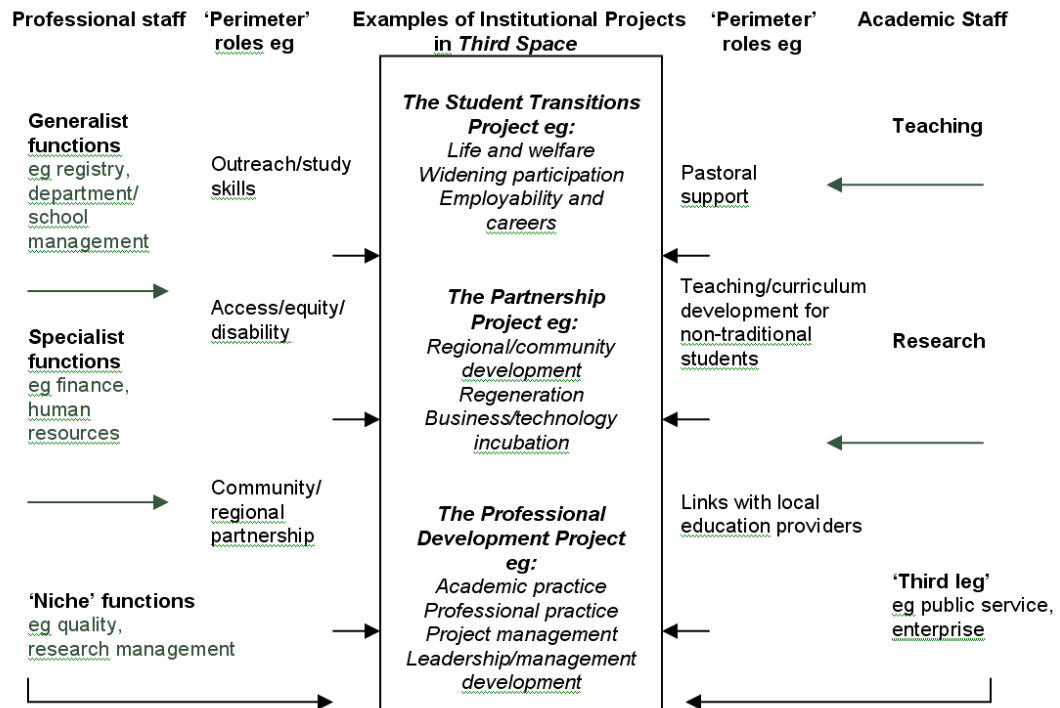
### ***The Third Space and Blended Professionals***

Based on interviews and surveys collected from a total of 61 higher education professional staff members in Australia, the UK and the US, and building on her earlier work exploring higher education professional identities, Whitchurch (2008d) identified that significant activity is being created between traditional professional services and academic domains in higher education institutions. She further identifies that this new domain is occupied by growing numbers of *blended professional* roles, professionals whose responsibilities span both academic and administrative domains (Whitchurch, 2009). Whitchurch (2008d) initially interviewed twenty-nine middle and senior managers in three case institutions and seven heads of administration to further explore the evolving roles and identities of UK managers in higher education. In light of these UK based findings, she then targeted *blended* higher education professionals in both Australia (10 interviews) and the US (15 interviews) to explore the variances in professional staff (Whitchurch, 2008c, 2009).

Whitchurch (2008c) argues convincingly that there is an emergent *third space* that exists between academic and professional services domains, which is populated by growing numbers of professionals focused on institutional projects created in response to internal and external environmental changes. The following figure depicts her key observations regarding the emerging *third space*.

Figure 8: The Emergence of the Third Space between Professional and Academic Spheres of Activity.

Adapted from Whitchurch (2008d)



On the left hand side of the diagram Whitchurch identifies professional staff in more traditional generalist, specialist and some niche functions. The right hand side of the diagram are traditional academic staff who engage in teaching, research and *third leg* activity. Whitchurch (2008d, 2008e) proposes that *perimeter* roles evolved around, for example, in the case of professional staff, outreach and study skills, equity and access, community and regional partnership; and in the case of academic staff, curriculum development for non-traditional students and engagement with local education providers have formed alongside the more traditional functions. She further argues that these *perimeter* roles have progressively converged in a *third space* around three broadly based projects: student transitions, community and industry partnership and professional development (Whitchurch, 2008c).

From this work, Whitchurch (2009) also identified a *rise of the blended professional* in higher education. She claims, the *third space* is populated by new and evolving roles, in

many cases these are hybrid professionals or *blended professionals*, who are called upon to perform effectively in both academic and administrative domains within fluid organizational structures (Whitchurch, 2008b). *Blended professionals* are appointed on the basis of experience that enables them to carry out mixed portfolios and they are characterized by an ability to build common ground with a range of colleagues, both internal and external to the university (Whitchurch, 2009). These roles commonly appear in areas of broad based institutional projects such as student life, community and industry partnership and professional development (Whitchurch, 2009). One of the key challenges for third space professionals and in particular those in a *blended* role is the that of legitimacy (Whitchurch, 2008c). Legitimacy is a particularly relevant issue when modifying organizational boundaries with new and evolving roles as legitimacy relates to a “generalised perception or assumption” that an entity’s actions are “desirable, proper, or appropriate within some socially constructed system of norms, values, beliefs, and definitions” (Suchman, 1995,p.574) and “leads those connected to it to believe that it is appropriate, proper and just” (Tyler, 2006, p.375).

Clearly, while the amount of focus and resources provided to *third space* projects varies from institution to institution, projects in the *third space* are grounded in concepts of organizational change. Their mere existence is change. Actors in these roles are challenged with carving out a space for their work within existing organizational boundaries and structures. Akin to all organizational changes, this may be enabled by a variety of factors, such as senior leadership support and alignment of rewards and it will certainly encounter at least some level of resistance (Beer and Nohria, 2000, Kotter and Cohen, 2002, Kotter, 1986, Torraco and Hoover, 2005). Inherently the work of *third space* and in particular the of work of those in *blended* roles requires an active navigation within the supporting and resisting forces that are unique to the institutional context and desired goals of the role incumbent. Moreover, the emergence of the *third space* suggests that

proactive interpretation of roles and cross-functional working are constructing new forms of identity and authority, which Whitchurch (2008c) argues is changing the legitimacies of wide range of higher education professionals.

## ***Method***

The primary data collection mechanism for this study was *via* interviews with Canadian teaching and learning professionals. Through a combination of structured and semi-structured questions, data was collected to both describe the formal structures and roles and elicit understandings regarding how the individuals saw their roles, identities and power bases. The interview topic guide leveraged the interview guide designed by Whitchurch (2008d, 2009) to explore the identities and roles of *blended* higher education professionals and, in recognition of their change oriented role, included question themes regarding the use of power and influence. The study participants include a total of 28 teaching and learning professionals from 19 unique institutions spanning eight of the ten provinces in Canada. Individuals at different hierarchical levels, with different focuses (e.g. educational technology, curriculum planning, etc.), working at different sized institutions with different general orientations (research focused, teaching focused) were purposefully sought and are represented.

As observed in the *third space* figure above, teaching and learning professional roles reside within the *third space* as part of the professional development project as outlined by Whitchurch (2008d). Based on their description of duties and functions which span both academic and administrative domains and their narratives associated with their identity and agency, they are identified as *blended professionals* within Whitchurch's constructs. The main contribution of this research in relation to the Whitchurch's framework are: the data from a Canadian context, a comparison of the key similarities and differences of *blended professionals* in the UK, Australia and US to Canada and additional

data and discussion which extends her observation regarding the challenge of legitimacy for *third space* work.

### ***‘Third Space’ and ‘Blended Professionals’ in Canada***

The emergent *third space* as broadly defined by Whitchurch (2008c) was observable through the interviews with teaching and learning professionals in Canadian universities. A number of similarities and one notable difference were identified when contrasting Canadian teaching and learning professionals with the group of *blended professionals* identified by Whitchurch (2009). First the observations and factors relating to the emergence of the *third space* phenomenon in Canada and how this phenomenon appears to be legitimated by institutions are discussed, then the ways this resembled the phenomenon observed in the UK, Australia and US contexts (Whitchurch, 2009) are presented and finally the difference observed, is discussed.

### ***‘Third Space’ and Issues of Legitimacy in Canadian Teaching and Learning Work***

The emergence of a *third space* work domain was supported by the findings from Canada. The trend of growth, consolidation and clustering of *periphery functions* (Whitchurch, 2008c) into the *third space* were clearly identified by Canadian respondents. However, as earlier observed by Whitchurch (2009) issues surrounding legitimacy for their work emerged as a dominant theme. The following section first presents the factors that respondents believed contributed to the emergence of the *third space* and then describes a number of changes in their work that respondents describe as being linked to their legitimacy.

Similar to Whitchurch’s (2008d) observation that, internal and external environmental trends appear to be driving the creation of the *third space*, respondents reported that they believe three primary factors contributed to the emergence of this phenomenon for

their work. First, government focus on quality assurance, which, for teaching and learning professionals, translated to a significant amount of curriculum work. Second, additional government funding for increased access, specifically funding was made available for blended and online learning projects, partially in response to the geographical access issues in Canada (Jones, 2009). Finally, participant narratives described an overall increase in institutional awareness and prioritization of the student voice in response to student choices and competitive pressures (Marsh, 2007). In the case of teaching and learning professionals, this has translated into a focus on and organizational prioritization of strategies intended to increase learner engagement and satisfaction. All of these environmental impacts were identified as key trends impacting how their work was evolving.

The work and roles of Canadian teaching and learning professionals have been changing significantly in recent years (Austin and Sorcinelli, 2013, Rice, 2007, Sorcinelli et al., 2006). As respondents reflected upon many of these changes they continuously returned to how those changes impacted their work in terms of their legitimacy (Deephouse and Suchman, 2008, French and Raven, 1959, Suchman, 1995, Tyler, 2006, Tyler and Blader, 2005). Key themes emerging from the Canadian study that appear to affect their perceived legitimacy are presented next.

Larger groups, *via* both growth and consolidation, have developed to replace the various “bits and pieces” previously associated with teaching and learning related functions and more senior posts have been created with oversight of these roles.

*“Two years ago, when I came here it was the first time they ever had a director of a teaching and learning centre, prior to that they had a faculty member in education. I was told - you’re going to get an online learning team. You’re going to get a teaching and learning centre. And you’re going to get the educational technology centre. And when*

*you arrive, you are going to merge all those together and build a new teaching and learning centre.” (Senior Teaching and Learning Post #1)*

The trend of growth, consolidation and clustering of *periphery functions* (Whitchurch, 2008c) into the *third space* was a prominent theme identified by Canadian respondents. This has manifested itself as the creation of *centres* which encompass a broad range of development functions, including: teaching and learning professionals from individual schools/academic departments, educational technology functions, and a variety of student support functions, such as teaching assistant training, graduate student training, general student writing or student math support.

*“... this new position of vice provost teaching and learning, that’s really interesting, because our ability... to really make [change]... although you can make change within individuals, but to really make changes in teaching and learning, it has to come at a more of an institutional or national or international level and that’s only going to be achieved when we have people who are in those positions at a higher level within the university.” (Senior Teaching and Learning Post #6)*

This growth and consolidation has appeared to increase their legitimacy (Suchman, 1995) through increased visibility and with the creation of more senior posts, they now have representation at a more senior level within the institution. Structural reporting was also identified as impacting the legitimacy of their work. Although many did not do so in the past, in all 21 institutions represented, the teaching and learning *centres* structurally reported up through the senior academic office. This structural positioning was perceived by respondents as important to both their professional identity and legitimacy as it clearly linked them to the academic domain, but is distinct and separate from any one faculty.

*"Initially my position reported to the Vice President of Student Services ...and then I was reporting directly to the Vice President Academic. That just lent enormous credibility without my having to do anything. And this particular VP Academic makes it really clear that he values my office. So in the political landscape of the institution, it's so important. And trading stories with my colleague, I think those who report to a really senior level manager, we have the protection of that office, but we also have sort of built in credibility." (Senior Teaching and Learning Post #3)*

*"...being positioned in the academic support side of the shop...it acknowledges that teaching is a scholarly enterprise, not just a logistical one. And that it is complicated and it involves critical reflection, like all academia does." (Educational Development Post #10)*

*"...one of the best things about our position is that we're seen as quite distinct from any given faculty. We need that." (Senior Teaching and Learning Post #6)*

The physical office space occupied by teaching and learning professionals and its location was also interpreted by respondents as significant to their legitimacy. Respondents commented that the centre's physical location, the design and the quality of space sent numerous inter-organizational messages regarding their work as well as institutional values and priorities. In particular, respondents offered that the library is an excellent physical location for a teaching and learning centre as they believed that the neutrality, the academic focus, the accessibility and the visibility were all positive attributes of this location.

*"...we completely redesigned a whole new teaching and learning centre on the top floor of the library. It's got a whole learning lounge area... a spot for them to sit and private consultation rooms. We're really valuing the faculty and giving them a nice place to work and meet with us....what the V.P. has done for me by elevating us, almost physically, to the penthouse suite is huge. It is very symbolic...they put a lot of talk into where your office is and what kind of view you have." (Senior Teaching and Learning Post #1)*



*"I need to have a lot of buy in from the faculty. They have to feel they own this centre so our centre is located in our library. We're quite specifically located here so that we'll be in a neutral zone because ... although I am an adjunct member of the faculty of education, I wouldn't want the centre ever to be there, because it's important that we be viewed as being neutral and transparent, that our only goal is enhancing teaching and learning within the university. Not in a specific area [department/school]...and so where we are is purposeful and that we have a transparent glass wall that leads into our offices, that is purposeful too." (Senior Teaching and Learning Post #8)*

In contrast, the lack of desirable space was also described by respondents as sending negative messages regarding how their roles are valued within the institution.

*"We always say that...if they really value what we do, they would give us a window. So we're sort of spread out across the institution now in terms of our staffing and where we're housed. We're all part of the centre, but there is no real centre." (Educational Development Post #4)*

In parallel with the general trend of growth and consolidation, a transition in the general purpose of teaching and learning work was described by respondents, from that of *"reactive remedial"* support to that of *"proactive ongoing enhancement"*. This transition was clearly linked to how they saw their work and how they were legitimated in their institutions.

*"My role has been shifting over the years, a shift from being a place you go for remediation to a place you go for enhancement. And that's quite a different... different view." (Senior Teaching and Learning Post #8)*

*"One of my goals has been to change our face in the university community from something that was... a place that people went when they had a problem to more of a*

*community where people can be part of something that is really a partnership and is more focused on prevention than on treatment if you like.” (Senior Teaching and Learning Post #6)*

As identified by Whitchurch (2008d) legitimacy is a key issue for all *third space* roles. The insights shared by Canadian teaching and learning professionals provide indication of what factors or variables are linked to that legitimization process in the Canadian higher education context.

We now turn to a discussion of the ways that this phenomenon compares to observations by Whitchurch in the UK, Australia and the UK.

### ***Comparing Canadian ‘Blended Professionals’ to the UK, Australia and US***

When comparing *blended professionals* from the UK, Australia and the US, Whitchurch (2009) found the “most striking difference between respondent profiles in the UK and those in Australia and the US was that a much higher proportion of staff in Australia and the US had higher degrees” (pg. 411). The following table summarizes Whitchurch’s (2009) findings regarding high degree attainment and incorporates the data from Canada.

**Figure 2: Blended Professional Higher Degree Attainment**

<b>Country</b>	<b>Master’s</b>	<b>Doctorates</b>
Australia	80%	60%
Canada	96%	48%
United Kingdom	27%	8%
United States	93%	60%

As seen above, in the US 93% of respondents had master's degrees and 60% had doctorates. In Australia, 80% had master's degrees and 60% had doctorates. In comparison, Canadian teaching and learning professionals reported that 96% held master's degrees and 43% held doctorates. These results are in closer alignment to, but slightly less doctorates than, Australia and US respondents. The comparable UK percentages are considerably lower at 27% and 8% respectively.

While the UK reported significantly lower levels of higher degree attainment, the narratives of all respondent groups, Whitchurch's (2008c) and the Canadian respondents, describe a general trend of increasing requirements to hold higher degrees. The narratives of Canadian respondents describe a general trend of increasing expectations for teaching and learning professionals at all levels to hold not only a master's but a Ph.D. Moreover, Canadian respondents identify a general trend towards increased expectations of involvement with a broad range of research. The extent of research involvement by Canadian teaching and learning respondents appears to be significantly greater than described by *blended professionals* in the UK, Australia and US. Research activities such as: acquiring internal and external research grants, independent research projects, collaborative research projects, regular publishing and presenting at conferences were described. Some *centres* also have their own research institutes housed within the teaching and learning *centre*.

As observed by Whitchurch's (2009) and consistent with the narratives of Canadian teaching and learning professionals, both of these variables, higher credentials and involvement with research appear to be closely linked to perceived credibility and associated with a *blended professionals'* legitimacy. For example, teaching and learning professionals commented that working with faculty on research projects helped establish

an academic relationship, a relationship that helped them raise awareness of teaching and learning work as a scholarly enterprise.

*“As faculty understand more that it is legitimate research to explore teaching and learning in your discipline...[that] it’s just as legitimate in the publication world and in your academic credibility. We get to work more hand in hand with them on various projects and then to publish together and I think that makes a really big difference.” (Senior Teaching and Learning Post #7)*

Moreover, the debate in the literature regarding if teaching and learning professionals should be classified as faculty members (Robertson, 2010, Sorcinelli et al., 2006) as well as the identified structural and identity tensions associated with faculty classification for *blended professionals* (Whitchurch, 2009) was reflected in the narratives of Canadian teaching and learning professionals. This issue is further complicated in the Canadian higher education system by the autonomy and inconsistency of institutional bargaining unit structures at different institution types. Some Canadian respondents were classified as in-scope within the faculty association; others were classified as in-scope within a supervisory or professional association, while others still were out-of-scope and classified within the management pay banding scales. These inconsistencies in classification and structure created tensions across the field of teaching and learning in Canada and within individual higher education institutions.

*“If you’re not in a faculty role, then there is a glass ceiling that actually occurs. I’ve been advocating...for the ability to achieve tenure through educational development work which is what happens in some other universities. Without faculty status ... I have less currency and universities are all about people currency.” (Education Development Post #8 - research focused institution)*

Whitchurch (2009) concludes that *blended* professionals in the US appear to be “*more mainstream*” and “*better understood*” than in the UK and Australia. While this assertion is informed by her overall interpretation, she leverages two key elements to support this conclusion. First, the higher levels of degrees held by US blended professionals and secondly, the different cultural understanding or higher “*value*” or “*status*” placed upon the term “*administration*” in comparison to the UK and Australia where the term administration “has tended to become devalued in that it is often used to refer to procedural, and even clerical tasks.” (Whitchurch, 2008c, p.411)

The “*value*” generated by a higher degree was an area of significant discussion and an area of varying opinions in the eyes of Canadian teaching and learning professionals. Interestingly, but perhaps not surprising given the emerging and *blended* nature of Canadian teaching and learning professional roles, participants described significant tensions associated with which academic credentials and what knowledge, skills and abilities are more valuable to their work and roles. They described this topic as an “*active debate*” within their institutions and their national professional association, with numerous focus groups and research being conducted towards a clearer career path and professionalization for the field of educational development.

*“She [her peer] is very dismissive of my experience. She thinks her Ph.D. in education should be valued more highly. The interesting thing is that education development is not only about knowing about education. Definitely, [in this centre] they value the education credential over experience. That’s been my experience anyway, even though I have a Ph.D.” (Educational Development Post #1)*

While increasing credentials gives indication of increasing professionalization (Whitchurch, 2008c), and associated legitimacy, it appears that while new roles are

emerging, there are inherent tensions associated with establishing the sources and boundaries of their knowledge base.

Similar to Whitchurch's observation of the differences between traditional and post-1992 institutions in the UK, there are also indications that the institution type impacts the role structure, professional identity and associated legitimacy of incumbents in Canada. Senior teaching and learning professionals, at teaching-focused institutions were most commonly on a management contract and while they described a modest overlap with the academic identity they were able to more comfortably to talk about their "*management contribution*" and were more likely to see themselves a "*professional service*" or "*colleague*" in relation to faculty. Whereas in more research-focused institutions, senior respondents were all hired on academic contract, more likely to describe themselves as "*academics*" and more likely to see themselves as "*advocates*" for teaching and learning and their teaching and learning *centre*. They described feeling the need to prove the value of their work and/or their *centres* work because of overarching institutional cultures that did not value teaching and learning. Some respondents commented that the attitudes of senior leadership or of specific schools/ departments were the impetus for their "*advocate*" role.

In summary, the emergent *third space* as broadly described by Whitchurch (2008d) was observable in the Canadian study. Growth and consolidation of *periphery* functions are resulting in changes to organizational structures associated with teaching and learning work. Canadian teaching and learning professionals are experiencing similar trends as other *blended professional* previously identified by Whitchurch (2009, 2008d). These include an increase in academic credentials, tensions tied to classification in a faculty or in non-faculty post and impacts related to the type or general focus of the institution. The only notable difference in Whitchurch's work describing *blended professionals*, when

compared to Canadian teaching and learning professionals, is the observation that Canadian teaching and learning professionals have increasingly higher expectations of participation in research. Finally, the one common thread that stands out in all of these changes is the central issue of legitimacy and how it affects if their work is seen as “desirable, proper, or appropriate” within the “socially constructed system of norms, values, beliefs, and definitions” of their institutions (Suchman, 1995, p.574).

Building on this common thread and Whitchurch’s (2008c) observation that the emergence of the *third space* suggests that proactive interpretation of roles and cross-functional working are constructing new forms of identity and authority, we now turn the discussion to the unique organizational space occupied by teaching and learning professionals. Focusing this study on a single group of *blended professionals*, enabled a more in-depth view into how ‘*third space*’ work is evolving. Where the organizational space for educational development work fits within the organizational landscape and the challenges Canadian teaching and learning professionals experience as they interpret and attempt to maintain this space, between the competing agendas of administration and faculty and students, emerged as a central theme from the narratives of Canadian respondents.

### ***Exploring the Boundaries and Organizational Space of Teaching and Learning Work***

Whitchurch (2008e) identified an increase in the number of *blended* professionals within the *third space* (between academic and administrative domains). She further observed that these individuals are able to work across the *faculty –administration divide* using translational skills to achieve effective outcomes. While these translational skills were evidenced as extremely relevant, in Canadian teaching and learning professionals’ narratives, it appears to be more than working across the divide that enables them to

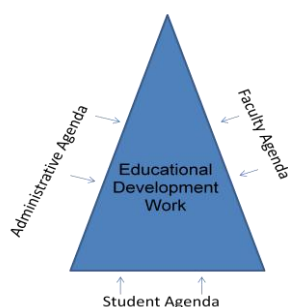
effectively influence change and achieve their goals. As discussed earlier, this is certainly impacted by their perceived legitimacy. Moreover, it appears to be linked to their sensemaking regarding who they are in relation to their key stakeholders and their ability to carve out a distinct and widely recognized organizational space. The following discussion attempts to unpack these observations and in light of the findings from the study proposes an interpreted model of the organizational space occupied by Canadian teaching and learning professionals.

Legitimacy and the interconnecting concepts of status and credibility were identified as key issues for not only Canadian teaching and learning professional, but for all *blended third space* roles. Based on the narratives of teaching and learning professionals and in alignment with Whitchurch's (2008c) observation that, "gaining acceptance of these new legitimacies is one of the key challenges arising for contemporary [higher education] professional staff" (p.30), it is suggested that understanding the key stakeholders of a particular role helps define a distinct organizational space, for newer, change oriented roles, such as those residing in the *third space*.

For example, the narratives of Canadian teaching and learning professionals indicate they are acutely aware that their work requires them to occupy a distinct organizational space and at the same time they see themselves as a "*bridge*" and "*translator*" between competing interest groups. Specifically respondents spoke about balancing and interpreting the needs of faculty, administration and students. Based on the narratives of respondents, the evolving organizational space for educational development work is visualized as follows:



**Figure 3: Evolving Organizational Space for Educational Development Work**



The narratives of respondents further focused on the importance of not being biased towards any existing agenda, be that of administration, faculty or students. It is suggested that this need to be “*unbiased*” and “*separate from*” any of the competing agendas is a critical element for teaching and learning professionals to claim and legitimize a distinct organizational space.

To explain this suggestion it is useful to consider Bourdieu’s insights. In Bourdieu’s terminology we can consider the relationship between “fields of practice” as “a configuration of relations between positions objectively defined in their existence and in the determinations they impose upon the occupants, agents or institutions” (Bourdieu and Wacquant, 1992). The historical duality of *fields* in higher education, those of faculty and administration, permeates the literature and rhetoric of universities and positions faculty as the central or dominant *field*. The traditional primacy of the faculty field in Universities indicates that, in Bourdieu’s terminology, the field of educational development was historically *embedded* within the discourse of a traditional service relationship as part of the *other*, the administration (Whitchurch, 2008d).

Carving teaching and learning out of the existing rhetoric of the *other* and claiming a component of work that has traditionally been seen as within the faculty space is not straight forward. It requires changing the existing perceptions of dominant actors. However, changing existing perceptions is not easy. Recent research demonstrates that a

field of practice can be *trapped* (Sandholtz, 2012) by pre-existing perceptions and legitimacies. To further complicate this process for teaching and learning professionals, a third, perhaps not new, agenda or voice must be negotiated as part of their work, that of the student (see e.g. Trowler and Trowler, 2010).

The narratives of respondents spoke clearly about the need to communicate their “*capability*” and “*value*” and to be perceived as distinctive from and not aligned with any of the existing agendas. As one respondent stated, we need to be “*a little Switzerland*”. It is suggested that consistency, in both the structure of their roles and their behaviour may reinforce the message that teaching and learning professionals have a distinct role. Again, in light of these findings, it is suggested as important for all newer and evolving professional roles in the *third* space. Consistency would help build new norms, values, beliefs, and definitions associated with their work which, in turn, would enable the creation of a separate and distinct organizational space. For example, respondents described the importance of separating themselves from evaluative tasks to avoid being perceived as part of the administration or “*administrative police*”. Respondents also indicated they should structurally report separately from any one faculty, school or department and that their physical space needed to represent their distinct position, as both academic in nature, but not affiliated with any specific faculty or school. In each of these examples respondents were evidencing their need to be perceived as occupying a distinct organizational space.

In a similar vein, Whitchurch (2008c) identified that successful working in the *third* space requires “finding the appropriate language...that ‘spoke to’ both academic and professional world-views...” and “involves recognition of, and an ability to navigate, the dualities created by the co-existence of professional and academic activity”. Teaching and learning respondents also identified the importance of language and framing of messages

to different audiences. For example, many respondents indicated the purpose or agenda of teaching and learning work was “*ongoing enhancement*” towards “*good teaching and learning*”. This agenda would be expected to resonate as vital and sanctioned by all higher education stakeholders however how that agenda is interpreted by various stakeholders is of interest. For example, faculty might envision “*good teaching and learning*” as engaged and developing students, senior administration might envision “*good teaching and learning*” as positive student feedback reports and increased student satisfaction ratings on league tables and students might envision “*good teaching and learning*” as interesting and organized classes. Awareness of and ability to translate and demonstrate a balanced view between these competing voices while evidencing expertise and alignment to their overarching purpose appears to be an important part of teaching and learning professionals being perceived as having a distinct and valuable organizational space.

It’s further suggested that for most *blended professional* roles the ability to balance their multiple stakeholder tensions and agendas will extend beyond the world-views of academics and administration. This is not to suggest, the dual boundary framework proposed Whitchurch’s *third space* framework is not useful. Quite the contrary, Whitchurch’s model provides an interesting lens to observe the macro organizational trend of boundary shifting in higher education. However, it is suggested that to further explore and tease out the nuances and to more clearly understand the opportunities and constraints of specific *third space* work it may prove useful to consider individual field of practice for analysis in order to better understand their organizational space in terms of boundaries encountered and primary stakeholder groups.

For example, in the case of teaching and learning professionals, the ability to navigate the tensions associated with faculty, administration and student agendas was deemed as

relevant by participants. Whereas, for example, in *third space* roles associated with regional and economic development, the ability to build bridges and translate between a wide range of external stakeholder groups would presumably be more relevant. An understanding of these role specific tensions may provide a deeper insight into the enabling or constraining factors associated with their work. Further, an awareness of the dominance of these often competing agendas may be useful to *third space* professionals when they consider which strategies would be most beneficial in the process of navigating their unique organizational space.

## ***Conclusions***

This paper provided an exploration of Whitchurch's (2008a, 2008e, 2009) *third space* in relation to a recent study with Canadian teaching and learning professionals. The constructs of *third space* and *blended professionals* were used to compare Canadian teaching and learning professionals with other similar UK, Australian and US *blended* professionals. This paper contributes to *third space* theory with data from the Canadian context and further extends Whitchurch's constructs by contributing insights acquired from interviews with a particular group of *blended professionals* regarding how their work is evolving.

The emergent *third space* as broadly defined by Whitchurch (2008c) was observable through the interviews with teaching and learning professionals in Canadian universities. Three primary factors appear to have contributed to the emergence of this phenomenon in Canada: government focus on quality assurance, government funding for increased access and an overall increase in the institutional awareness and prioritization of the "student voice".

Growth and consolidation of *periphery* functions are resulting in changes to organizational structures and teaching and learning work appears to be consolidating into

the *third space*. Moreover, similar trends as those identified by Whitchurch (2009, 2008d) were discussed. These include an increase in academic credentials, ongoing tensions tied to classification in a faculty or non-faculty post and the impacts of the institutions' historical roots, as either a teaching-focused or research-focused institution, on senior teaching and learning professionals' classifications and on how they see their professional identity. The one notable difference to Whitchurch's findings was that Canadian teaching and learning professionals appear to have higher expectations of participation in research. Moreover, a common thread linking each of these observations related to the issues of developing their perceived legitimacy.

Building on the dominant theme of legitimacy and stemming from the narratives of teaching and learning professionals, a proposed model of where the work of teaching and learning professionals resides was presented. This space resides between the often competing agendas of administration, faculty and students. In summary of the observations and discussion, it was proposed that research which focuses on the individual field of practice for analysis may be useful in an effort to gain a more nuanced view of the work, the boundaries and the tensions associated with evolving *third space* roles.

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